REPORT RESUMES

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MDTA BUSINESS EDUCATION PROJECTS.
CALIFORNIA STATE DEPT. OF EDUCATION, SACRAMENTO
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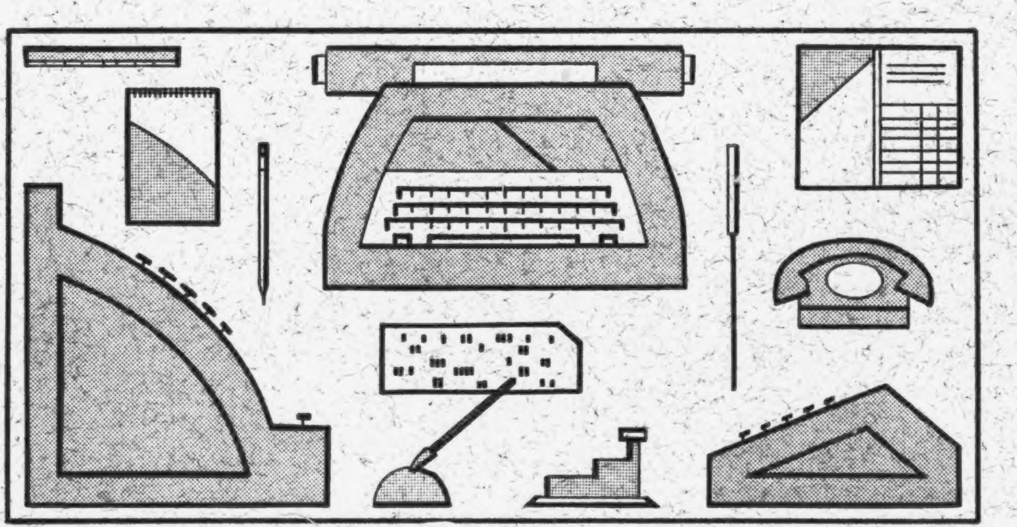
DESCRIPTORS- *BUSINESS EDUCATION, *MANPOWER DEVELOPMENT, *PROGRAM PLANNING, *PROGRAM GUIDES, CURRICULUM, RECORDS (FORMS), PROGRAM DEVELOPMENT, STENOGRAPHERS, TYPISTS, PROGRAM EVALUATION, MANPOWER DEVELOPMENT AND TRAINING ACT,

THE APPLICATION OF THE MANPOWER DEVELOPMENT AND TRAINING ACT (MDTA) PROGRAM PROCEDURES AND POLICIES IN THE FIELD OF BUSINESS EDUCATION IS EXPLAINED IN DETAIL BY PRESENTING SAMPLE FORMS AND PROJECT DESCRIPTIONS FROM THIS FIELD. THE RESPONSIBILITY AND AUTHORITY FOR IMPLEMENTATION OF THE ACT AT THE FEDERAL, STATE, AND LOCAL LEVELS ARE DISCUSSED. SAMPLES OF THE TRAINING ORDER AND THE TRAINING PLAN AND PROPOSAL, FORMS REQUIRED FOR OPERATION OF A PROJECT, ARE INCLUDED WITH INSTRUCTIONS FOR THEIR COMPLETION. THE LATTER USES RECOMMENDED BASIC CURRICULUMS FOR TRAINING STENOGRAPHERS AND CLERK-TYPISTS AS EXAMPLES AND DISCUSSES COURSE STRUCTURE, FACILITIES AND EQUIPMENT, BUDGET, AND METHODS. INFORMATION ON IMPLEMENTATION AND FUNDING EXPLAINS PROCEDURES, INCLUDING FORM NUMBERS, FROM PROJECT APPROVAL TO FINAL SETTLEMENT. TRAINING OPERATIONS COVER (1) KINDS OF INSTRUCTION SUCH AS CLASSROOM, DEMONSTRATIONS, AND ON-THE-JOB PRACTICE, (2) COUNSELING, (3) SUPERVISION, AND (4) EVALUATION OF TRAINEES. A BRIEF LIST OF REQUIRED REPORTS AND SAMPLE FORMS FOR A STUDENT FOLLOWUP AND A PROJECT EVALUATION CHECK SHEET ARE INCLUDED. (PS)

ED016051

MDTA BUSINESS EDUCATION PROJECTS



BUREAU OF BUSINESS EDUCATION
CALIFORNIA STATE DEPARTMENT OF EDUCATION

Max Rafferty
Superintendent of Public Instruction

Sacramento, 1965

VT 01676

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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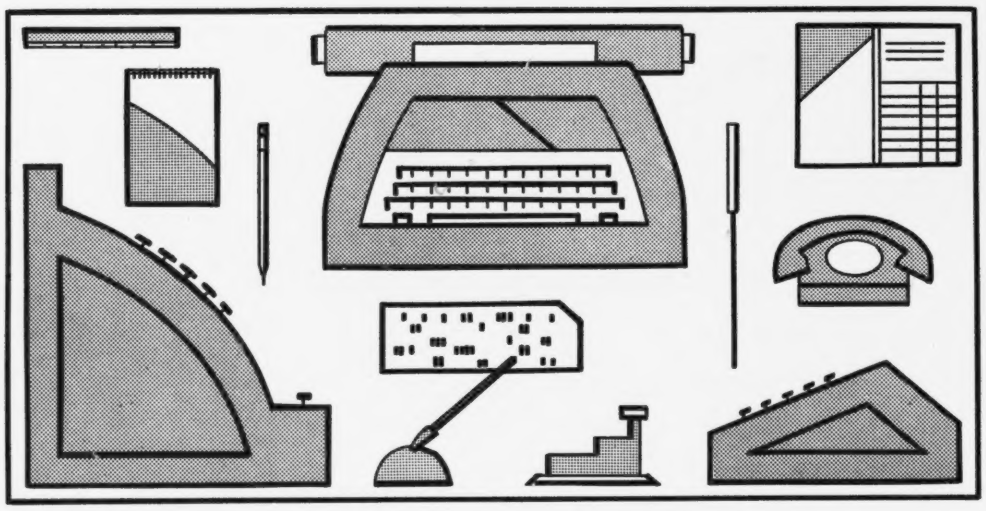
MDTA BUSINESS EDUCATION PROJECTS



BUREAU OF BUSINESS EDUCATION
CALIFORNIA STATE DEPARTMENT OF EDUCATION

Max Rafferty
Superintendent of Public Instruction

Sacramento, 1965

Foreword

Every area is served by business enterprises, and these enterprises offer opportunities for employment. However, those who wish to grasp these opportunities must have the preparation needed to do the required work.

One function of the Manpower Development and Training Program is to aid the schools in an area to develop and maintain educational projects that are designed to make the preparation available. Another of its functions is to provide for the recruitment and selection of candidates who may then, by participating in the projects, become qualified for employment. Many of the projects conducted under this program have been in the field of business education, since in most communities business enterprises are among the richest in the provision of employment opportunities.

This publication contains most of the information that a training agency needs to develop and to conduct business education projects under the provisions of the Manpower Development and Training Act. Use of this information should prove valuable to the training agencies, the student populations served, and the business enterprises in the areas of the agencies.

Max Rafferty

Superintendent of Public Instruction

Preface

This publication, MDTA Business Education Projects, has been designed to supplement the MDTA Manual, which is published by the California State Department of Education and which is used by all educational agencies who furnish training, supervision, or management to MDTA projects. MDTA Business Education Projects explains in detail the application of MDTA procedures and policies in the field of business education by presenting sample forms and project descriptions drawn from this field and by suggesting appropriate content and methods.

Material in this publication has been drawn from experience gained in several years of operating business education projects in the MDTA program and from special studies of the results of those projects.

Funds available under the Manpower Development and Training Act were used to develop and produce the publication. The loose-leaf format will make it possible to insert revisions and additional materials as they become available in the future.

J. GRAHAM SULLIVAN
Chief, Division
of Instruction

WESLEY P. SMITH
Director of
Vocational Education

RULON VAN WAGENEN
Chief, Bureau of
Business Education

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Part I

ADMINISTRATION AND PROCEDURES

The basic purpose of Public Law 87-415, the Manpower Development and Training Act (MDTA), is to assist unemployed and underemployed people to obtain jobs where vacancies exist by providing necessary training in the required skills which these people lack. In the implementation of the Act, responsibilities and authority have been assigned and procedures have been developed at the national, state, and local levels. Those pertinent to carrying out MDTA projects in the field of business education are treated in this publication.

A. RESPONSIBILITIES AND AUTHORITY

1. Federal Level

Public law 87-415 assigns responsibilities and requisite authority to the Secretary of Labor for the determination of vacancies, for the selection of trainees, and for the placement of those successfully completing courses. To the Secretary of Health, Education, and Welfare are given the responsibilities and authority for the provision of the requisite training. Both these sets of responsibilities are carried out by entering into agreements with the corresponding employment and educational authorities of each of the states.

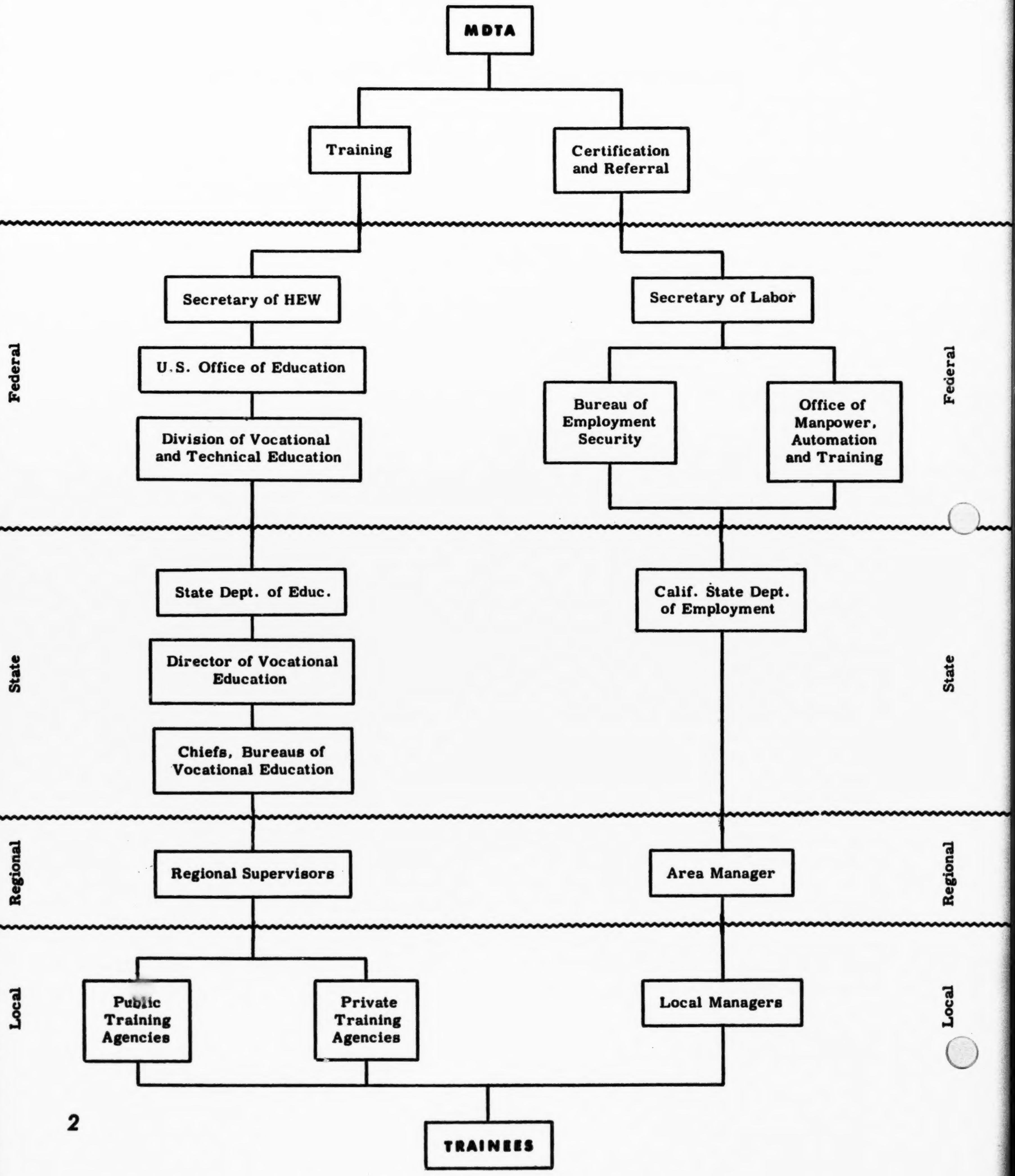
A National Advisory Committee is set up under MDTA, appointed by the Secretary of Labor, to make recommendations to the Secretary and to encourage and assist in the formation of other committees and groups in futherance of the purposes of the Act.

2. State Level Responsibilities

In California under the terms of federal-state agreements, the services in support of the responsibilities of the Secretary of Labor are performed by the California State Department of Employment at both state and local levels, while services in support of the responsibilities of the Secretary of Health, Education, and Welfare are performed by or under the supervision of the Department of Education.

With respect to MDTA operations in the field of business education, the Bureau of Business Education is assigned the duties of the Department of Education, both operational and supervisory. Regional representatives of the Bureau perform the functions appropriate to their geographical location and participate in those of a statewide nature.

LINES OF RESPONSIBILITY UNDER THE MANPOWER DEVELOPMENT AND TRAINING ACT OF 1962


MDTA
Training
Certification and Referral
Federal
Secretary of HEW
U.S. Office of Education
Division of Vocational and Technical Education
Secretary of Labor
Bureau of Employment Security
Office of Manpower, Automation and Training
Federal
State
State Dept. of Educ.
Director of Vocational Education
Chiefs, Bureaus of Vocational Education
Calif. State Dept. of Employment
State
Regional
Regional Supervisors
Area Manager
Regional
Local
Public Training Agencies
Private Training Agencies
Local Managers
Local
TRAINEES

The State Manpower Advisory Committee, whose 14 members represent management, labor, the general public, and appropriate state agencies, cooperates with and assists the National Manpower Advisory Committee, established under MDTA, in its functions.

A State Board of Review, whose members represent education and employment authorities at both the state and national levels, is established to give final review to training proposals. From their review meetings are derived the federal approvals of each project.

3. State Level Functions

a. The Department of Employment performs the following functions:

- Approves applications for the establishment of training projects
- Requests the Department of Education to provide the needed training
- Processes monetary allowances for trainees
- Administers reporting requirements of its local agencies

b. The Department of Education performs the following functions:

- Selects and designates training agencies
- Reviews and approves training plans and proposals
- Assists training agencies in their functions
- Supervises training
- Processes payments to training agencies
- Administers reporting requirements of training agencies

4. Local Level Functions

a. Units of the Department of Employment:

- Identify training needs by locating job openings for which there are insufficient qualified applicants
- Establish the entry skills requirements of these jobs
- Locate people who could, with appropriate training, become qualified
- Initiate requests for training
- Give initial approval to training plans and proposals submitted by local training agencies
- Select and certify trainees to designated training agencies
- Make required reports during the duration of each project
- Assist in placing trainees who have completed training into jobs
- Make periodic follow-up surveys and report the results of them

b. The training agencies selected by the Department of Education perform the following functions, with the assistance and under the supervision of the State Department of Education:

- Prepare training plans and proposals
- Provide the training required and the local supervision and administration - in such fashion as to provide trainees with the required skills
- Make periodic evaluations of trainees, teachers, and projects
- Perform such follow-up studies as may be appropriate to planning future projects

c. Local committees are established to assist in the program:

(1) Coordinating committee. The local coordinating committee is established by the State Department of Employment and is composed of representatives of the State Department of Employment, State Department of Education (Regional Supervisor of Business Education in the case of business education projects), the State Division of Apprenticeship Standards, and the U.S. Bureau of Apprenticeship and Training. Its primary function is to determine the appropriate training agency which will be responsible for each project. The committee meets on call of the local office of the Department of Employment at as early a stage as practicable in the development of each project, and prior to the preparation of the official request for training by the State Department of Employment.

(2) Advisory committee. This committee consists of the same membership as the coordinating committee above with the addition of representatives of labor, management, each school district served, and civic groups. The purpose of its meetings is to obtain understanding and support for all MDTA activities in the community area.

(3) Vocational advisory committee. A committee established by the local school to advise and counsel the school staff on matters of curriculum, teachers, standards, and other aspects of safeguarding quality in MDTA projects. The membership may be the same as that of existing committees established to serve the needs of vocational education courses, and should represent employees, employers, and appropriate government agencies.

B. SEQUENCE OF EVENTS

The sequence of events and actions in the life of a single business education project is outlined in the paragraphs which follow. The outline emphasizes the functions and responsibilities assigned to or supervised by the Bureau of Business Education as the representative of the State Department of Education.

It is important to note that the progression is not purely consecutive. However, overlapping actions and blending events are accompanied by communication, consultation, and cooperation, both horizontally and vertically, between the officials of the employment and educational agencies involved, to the end that orderly progress is expedited, and time lags are reduced to a minimum. The elimination of lost time between the establishment of a need for a training project and its completion is of the greatest importance, since changes in personnel requirements can occur most rapidly, and employment opportunities for which people are being trained can disappear during a prolonged training period.

1. Preliminary Events

a. Coordinating committee meeting. The staff members of the Bureau of Business Education first become involved in a potential MDTA training project by attending a coordinating committee meeting at the local office of the Department of Employment. At this time, the local Employment representative presents an unofficial request for training that has been developed by his agency.

The committee is composed of representatives of the State Department of Employment, the State Division of Apprenticeship Standards, the U.S. Bureau of Apprenticeship and Training, and the Regional Supervisor or his MDTA Assistant.

It is the duty of the member of the Bureau staff present at the coordinating meeting to help the committee determine the appropriate agency which is to be assigned responsibility for conducting the training.

b. Advisory committee meeting. A meeting of this committee may be held during the preliminary stage to obtain community opinion on the proposed training project, advice as to its details, and support for its operations after approval. Both the Training Order and Training Proposal can be facilitated by such a meeting.

2. Planning-Stage Events

a. Preparation of training order. The local office of the State Department of Employment prepares a Training Order (Form MDT-1) and forwards it for action to the State Director of Vocational Education. On his behalf, the Bureau of Business Education then takes initial action regarding the project.

b. Selection of training agency. The Bureau of Business Education selects training agencies to conduct MDTA projects in business occupations. When considering a training agency that has not conducted MDTA projects previously, a staff member meets with the administrative head of the agency, or his designee. At this meeting, the staff member of the Bureau explains the purposes of MDTA, the role of the local training agency, and the financial arrangements for reimbursement of the agency. A training agency may agree or refuse to submit a proposal to conduct the training. In the case of a refusal, another qualified agency is sought. If none can be found, the Department of Employment and the U.S. Commissioner of Education are so notified promptly. When a selected training agency has agreed to provide the training, the Training Order is transmitted to it for action.

c. Preparation of training plan. The selected training agency then develops a training plan and proposal designed to fulfill the requirements of the training order. The Bureau of Business Education assists to the degree necessary and possible. The proposal is then submitted for review and approval.

d. Preparation for training. During the process of review and approval the personnel of the local office of the Department of Employment and the personnel of the training agency may start advance planning, or this may be deferred until approval. Such actions as preliminary screening of prospective trainees, instructors, and facilities, and the planning of equipment utilization may be appropriately initiated. The Bureau representative assists the local training agency throughout the preparation period. No definite commitments and no expenditures are made before final project approval and funding are accomplished.

e. Review and approval of the training proposal. The review and approval of a training proposal take place at three levels--local, state, and federal. At each level, both employment and educational agencies are involved. The steps involving educational agencies are as follows:

(1) The Regional Office of the Bureau reviews the proposal. If any part is unsatisfactory, the problem is resolved between the regional office and the training agency by negotiation. When considered satisfactory in all respects, the proposal is forwarded to the Bureau Chief, with recommendation for approval.

(2) The Bureau Chief provides a second review of each training proposal. Again, any unsatisfactory items are corrected by negotiation with the agency , through the regional representative. When acceptable to the Bureau Chief, the proposal is forwarded to the State Director of Vocational Education for his review. If he approves the proposal is submitted to the Review Board.

(3) The training proposal receives its final review from the Review Board. This Board is composed of officials of employment and educational agencies at both the state and federal levels. Members of the staff of the Bureau of Business Education attend the review meetings so that they may answer any questions that arise concerning projects for which the Bureau is responsible. Final approval or disapproval by designated Federal representatives results from this review.

Approval of the proposal includes approval of the included budget and expenditure schedule. An approved proposal is transmitted through channels to the training agency for implementation when the funds are in fact available.

3. Training Operations

a. Training: In accordance with the schedules of the approved training plan, the Department of Employment authorizes the selected trainees to report to the training agency for instruction. The training agency undertakes the training phase and is responsible for carrying it to completion. Employment remains available for consultation and guidance throughout the course.

b. Reports: Through the training period, the training agency makes required reports to the departments of Employment and Education concerning the progress of the project and of the trainees.

c. Bureau activities. The Bureau of Business Education has a supervisory responsibility to ensure that each project is conducted with maximum efficiency, and in accordance with the approved plan. Both factors are checked by periodic visits to the training agency and by review of the reports submitted. When difficulties of any sort develop, the facilities of the Bureau and, through the Bureau, facilities of other appropriate agencies are made available to assist the training agency in every way possible to solve the problems.

d. Resolution of problems. It is important to the efficient and economical operation of each project that problems which arise should be solved as soon as practicable. To this end, the local agencies involved should maintain communication and cooperation throughout the life of each project, with a view to the local resolution of all difficulties whenever this can be accomplished without recourse to higher levels, with attendant delays and expense.

4. Post-Training Actions

a. Surveys. The Department of Employment makes follow-up surveys of the results of each project in terms of the subsequent employment experience of the trainees who completed the course successfully.

b. Studies. The training agency and the Bureau may also initiate such studies as they consider proper to lead to improvements in the training aspects of projects under MDTA. Care should be taken, however, not to duplicate the work of the Department of Employment, since its reports are made available to the educational agencies.

Part II

THE TRAINING ORDER

A. PURPOSE

The Training Order is the document by which the State Department of Employment advises the Department of Education of a requirement for the latter to provide a course of training under the terms of the MDTA. A Training Order initiates each project, and becomes a part of the Training Proposal.

B. FORMAT

Form MDT-1, "Notification of Occupational Training Need Under MDTA," is used to convey the training order. It may be, and usually is, accompanied by supplemental sheets giving further details of the scope of training required and information concerning the prospective trainees.

C. CONTENTS OF THE TRAINING ORDER

The originating local office of the Department of Employment prepares the completed MDT-1 and obtains the approval of the Director of Employment. After identification of the originator and the occupation for which training is required, the following information is included:

1. Job Description

A description of the duties of the occupation, from standard job descriptions, or derived from a survey of the specific needs of the prospective employers in the area.

2. Training Objective

A statement of the training objective and the performance requirements to be attained by each trainee who successfully completes the course. These two items taken together establish the results to be obtained, and hence govern the design and content of the training plan. They are derived by employment from the hiring requirements of local businesses.

3. Number of Trainees

The estimated number of people who can be made available for training, and the estimated number for whom job opportunities will presumably be available upon completion of the training. These numbers are determined incidental to the regular operations of the local employment office, perhaps supplemented by a special survey.

4. Characteristics of Trainees

The personal characteristics of potential trainees. These are given in fairly general terms of age, previous education, experience, skills, and abilities. Since they describe the raw material from which training must produce a specifically qualified finished product, they are most important to the design of the training plan. In many instances additional useful and even vital information can be obtained by consultation with the local officials of the State Department of Employment, making possible the preparation of an optimum plan, or leading to necessary modifications in the composition of a trainee group. The information is derived from the current applications for employment.

5. Other Data

The MDT-1 gives the expected range of wages at which trainees may be hired, and includes a summary labor market analysis showing the derivation of the training requirement in numbers. Additional information may include a tentative schedule for the training project, and any other data or observations which the Department of Employment considers may be helpful in evolving an optimum training plan.

6. Clarification

Whenever any of the information given on the MDT-1 is not clear, or appears insufficient, contact should be established by the interested representative of the Department of Education or of the training agency with the originating office of the Department of Employment without delay, in order to expand or clarify the information in the training order. A sample MDT-1 is included at the end of Part II.

D. ACTION BY EDUCATION AGENCIES

Upon receipt from the Department of Employment of an approved training order, the Department of education proceeds to determine the training agency to be assigned the project, and that agency prepares the training plan and proposal whereby the requirements of the order will be fulfilled.

Several considerations must be looked into in deciding which agency should be selected to provide the training, for example:

- Are the physical facilities adequate for conducting a particular type of training for a specified number of people?
- Is the training agency conveniently located for most of the trainees who will be involved?
- Can the training agency provide adequate instructors and supervisors?
- In the case of the private school, is the training agency authorized to conduct the particular kind of training involved?

NOTIFICATION OF OCCUPATIONAL TRAINING NEEDS
UNDER THE MANPOWER DEVELOPMENT AND TRAINING ACT

Date ____________
MDT-1 No. ~~XXX~~
MDT-1 Rev. No. ____________

Labor Market Area San Francisco-Oakland (name) C-15 (number) Alameda (county or counties)

Local or Area Office Hayward (name) 034 (number)

1. Occupation Secretary (Medical) (title) 1-33.01 (D. O. T. Code)

   a. Description of occupation:

      See attachment

   b. Training objective:

      See attachment

   c. Performance requirements:

      See attachment

2. Estimated number of workers needed over the 12-month period: 60

3. Estimated potential number of workers available for training: 60

   a. Personal characteristics of potential trainees:

      See attachment

4. Wage rate or range of rates at which trainees are expected to be employed $325-350 per Month

The undersigned has determined (1) that wage rates, hours, and conditions of work in the jobs for which training is needed conform with standards in the area of employment; (2) that the occupational shortage is not due to restrictive hiring practices; (3) that there is a reasonable expectation of suitable employment for 60 trained persons using skills acquired through training.

Recommended for Training Proposal: /s/ John Doe
Local Office or Area Manager

Approved: /s/ Richard Roe
Director of Employment

MDT-1 Rev. 2 (3-63) NOTIFICATION OF OCCUPATIONAL TRAINING NEED UNDER MDTA

State of California
Department of Employment

MDT-1 - SUMMARY TABLE - LABOR MARKET ANALYSIS OF OCCUPATIONAL NEED

Item			Number
1. Demand and supply during next 12 months			
a. Demand within 12 months			
(1) Expansion needs	16		
(2) Replacement needs	62	Total	78
b. Supply within next 12 months			
(1) Unemployed persons currently available and qualified for the occupation	0		
(2) Persons expected to complete training in existing facilities or on the job	10		
(3) Other entrants in occupation	8	Total	18
c. Training requirements (a-b)			60
2. Immediate shortages			
a. Current vacancies			4
b. Job openings in local office			13

COMMENTS (See MDTA Handbook VII - 6b & 6c - use additional pages if necessary):

1. Number of referrals this office could accomplish for one class 20

2. Number of trainees expected to be placed within a period of 30 days after training 20

3. Tentative schedule for training courses

Number of Trainees	Class Scheduled
20	1-13-64
20	4-20-64
20	8-31-64

* See attachments.

(Reverse of MDT-1 No. XXX)

Supplementary Information to MDT-1 No. XXX

Hayward
034-6

Medical Secretary
1-33.01

PART I

1. a. Description of Occupation

The specific duties in this occupation may vary from one position to another. However, the medical secretary usually handles correspondence, transcribes data from dictating equipment, types case histories of patients and keeps them current, maintains files and orders supplies. Often she is bookkeeper and receptionist. As bookkeeper, she handles financial transactions of the office, maintaining records and billing patients. Her responsibilities may include payroll and preparation of tax reports. She must also complete insurance forms related to health and hospitalization claims of patients. Office machines typically used include: typewriter, adding machine, transcribing and duplicating equipment.

Additional duties commonly include sterilizing instruments, preparing patients for examination, checking heights and weights and making certain types of laboratory tests.

1. b. Training Objective

The course objective is to prepare the student to assume the varied duties and responsibilities of a medical secretary as described in the description of the occupation. Training will be directed toward developing proficiency in the use of office machines and equipment and emphasis will be placed on the instruction of medical terminology. It will also include office procedures and ethics typical of the medical profession as well as limited nursing and laboratory tasks.

1. c. Performance Requirements

Trainees entering employment subsequent to completion of the course must type accurately a minimum of 55 wpm and take shorthand at a minimum of 80 wpm. They must have a good basic knowledge of medical terminology and be proficient in transcribing dictated notes accurately into case records or other documents. They must be able to maintain files, records and schedules efficiently. Tact, resourcefulness, and a mature attitude are essential personal attributes. The entry level requires high proficiency in job performance although employers typically have a period of initial orientation to acquaint the employee with policies and procedures pertinent to their particular office.

3. a. Personal Characteristics of Potential Trainees

All trainees will be women with a minimum of a high school education. The age range is estimated to include approximately 10% between 18 and 21 years, 80% between 22 and 44 years and 10% between 45 and 50 years. A common attribute of all potential trainees is lack of developed skills which constitutes a serious barrier to securing employment. Past work experience encompasses three general categories: limited work experience, prolonged absence from the labor market, work experience in which the skills and abilities involved are obsolete or in diminishing demand.

Part III

THE TRAINING PLAN AND PROPOSAL

A. PURPOSE

In order that the reviewing and approving authorities may be assured that the training requirements of a project will be fully met, the selected training agency is required to design and present a training plan which, when carried out, will take the trainees from the level of achievement at which they enter the program to the skills level specified by the training order. The successful completion of the planned courses should thereby assure the trainee that he is qualified for employment in the occupation for which he was trained.

The addition of a substantiated budget estimate and a proposed schedule of training make up the total proposal for the establishment of an MDTA project.

B. FORMAT

The format in which the plan and proposal are submitted is prescribed in some detail and should be closely followed. Enough latitude is provided to enable the effective presentation of all the information necessary to justify approval of the project.

The training plan is prepared according to the outline given on Form OE 4014 "Guide for the Preparation of Training Plan". The outline includes provision for inclusion of the schedules of instruction.

The estimated cost is given on a copy of Form OE 4000, accompanied by substantiating information outlined on the instruction sheet for OE 4000.

The packet is completed by the addition of an Application for Approval of Training Project (Form VEMDT-1 or VEMDT-2), an Application for Occupational Training (Form MDT-2), prepared jointly by the training agency and the local office of the Department of Employment, and a copy of the pertinent Form MDT-1. Fourteen copies of each document are prepared and arranged in the following order: Form MDT-2, Form MDT-1, Form VEMDT-1 or -2, Form OE 4000, Supplements for Form OE 4000, and the plan based on Form OE 4014.

OE-4014

GUIDE FOR PREPARATION OF TRAINING PLAN
Manpower Development and Training Act (P. L. 87-415)

Each proposed occupational training project or course must be accompanied by a training plan. The following outline constitutes the minimum information for a training plan and that which is necessary to review the appropriateness of proposed training under the Manpower Development and Training Act.

USE CODE BELOW IN PREPARING TRAINING PLAN OUTLINE.

1. GENERAL INFORMATION

1.1 Occupational title and DOT Code for occupation reflecting course content.
1.2 Starting date and completion date - all sections.
1.3 Length of course in clock hours - that is, how long an individual trainee would have to be in attendance in order to complete the course. Indicate how length of course was determined. Indicate how the specific number of hours in the week was determined.
1.4 Total Number of Sections - Number of separate groups of trainees which will be given the training course content.
1.5 Schedule of Sections - Indicate the proposed beginning and ending dates for each section. The schedule of the separate sections should be blocked out in diagram form to indicate those which may overlap, operate concurrently, follow consecutively, etc. Dates of regularly scheduled school closures affecting this program, and expected to occur during a training course section should be identified with the appropriate section in the schedule.
1.6 Name of agency which will give immediate supervision to the course, and extent of such supervision including number of staff, etc.
1.7 Statement as to whether the proposed course is intended for employed or underemployed persons, and the expected ratio if mixed.
1.8 Name, location, and description of space to be utilized for this course, equipment available, and list of equipment proposed for purchase showing unit cost for each proposed item.
1.9 Description and estimated cost of minor remodeling, if any, of public facilities.

2. COURSE INFORMATION

2.1 Statement of trainee educational background and/or previous experience prerequisite to enrollment in or successful completion of the course.
2.2 List of reference books, manuals, textbooks to be used by trainees, and of visual or other instructional aids.
2.3 Standards of performance expected at course completion such as "45 wpm in manuscript typing," "guided bend welding test," etc.
2.4 Brief description of records which will be kept on trainee progress.
2.5 List in topical outline form the major units or divisions of the course indicating the approximate clock hours to be devoted to each.
    2.5.1 Identify the specific skills that will be developed in each major unit or division of the course in terms of job requirements.
    2.5.2 Identify the instructional materials, teaching aids, new equipment, etc., with the appropriate topic in the course outline.
    2.5.3 Describe methods to be used in evaluating trainee progress and achievement - give names and types of tests to be used, etc.

3. INSTRUCTOR INFORMATION

3.1 Identify the number and titles of instructional personnel required and show the expected full time equivalency of each.
3.2 List the minimum acceptable instructor qualifications in terms of formal education and previous occupational experience.
3.3 Indicate the hours per day for each instructor, the anticipated salary or wage on the basis of hourly rate, and total cost. Give statement justifying salary to be paid.

alif. State Dept. of Education
ocational Education
E-4000 (Rev. 2-65)

COST OF OCCUPATIONAL TRAINING

PROJECT NO.

STATE

(X one) ☐ **MANPOWER DEVELOPMENT AND TRAINING ACT, P. L. 87-415** ☐ **AREA REDEVELOPMENT ACT P. L. 87-27**

NAME AND ADDRESS OF LOCAL PUBLIC TRAINING AGENCY RESPONSIBLE FOR THIS COURSE

NAME AND ADDRESS OF INSTITUTION OR AGENCY (SCHOOL) THAT WILL CARRY OUT THIS TRAINING COURSE

OCCUPATIONAL TITLE

DOT CODE NO.

(X one) ☐ **BUDGET ESTIMATE** ☐ **BUDGET REVISION** ☐ **ACTUAL COST**

(X one) ☐ **INITIAL PROJECT** ☐ **REPEAT PROJECT**
Previous project No.____________

			AMOUNT REQUESTED OR EXPENDED	*(For State and Federal Use Only)* AMOUNT APPROVED
1.	INSTRUCTIONAL SERVICES	TOTAL →	$	$
	A.	Instructional salaries only		
	B.	Instructional supplies, including shipping costs		
	C.	Rental of instructional equipment		
	D.	Local supervision (where applicable)		
	E.	Guidance and counseling salaries		
	F.	Other allowable items		
		Salaries included in item F above ($)		
2.	FIXED CHARGES	TOTAL →	$	$
	A.	Rental of nonpublic space		
	B.	Employer share of employee benefits		
	C.	Other fixed charges		
3.	EQUIPMENT MAINTENANCE AND REPAIR	TOTAL →	$	$
	A.	Repair and servicing of equipment		
	B.	Other maintenance and repairs		
4.	EQUIPMENT PURCHASE (PUBLIC FACILITIES ONLY)	TOTAL →	$	$
	A.	Initial purchase of instructional equipment		
	B.	Minor equipment, tools, and reference books		
	C.	Minor remodeling of school plant		
	D.	Other capital expenditures		
5.	OTHER COSTS NOT ELSEWHERE CLASSIFIED	TOTAL →	$	$
	A.	Utilities (including telephone)		
	B.	Custodial or janitorial salaries		
	C.	Tuition, fees, or other incidental student charges		
	D.	Trainee transportation		
	E.	Other miscellaneous costs		
6.	**COST OF THIS COURSE** (Lines 1 through 5)	TOTAL →	$	$
7.	AMOUNT OF FEDERAL FUNDS INCLUDED IN LINE 6		$	$
8.	AMOUNT OF STATE FUNDS INCLUDED IN LINE 6		$	$
9.	AMOUNT OF LOCAL FUNDS INCLUDED IN LINE 6		$	$
10.	ESTIMATED COST PER TRAINEE HOUR	$		
11.	TOTAL TRAINEES COMPLETING TRAINING	No.		

uperintendent or Designate — Title — Date

APPROVED

ommissioner's Representative — Date — State Director, Voc. Ed. — Date

California State Department of Education
Vocational Education Section
(2/65)

INSTRUCTIONS FOR FILLING OUT FORM OE 4000

EXPENDITURES FOR OCCUPATIONAL TRAINING
Classification of Expenditures
For Use in Completing Form OE 4000

This form is to be used in both ARA and Manpower Development and Training programs. Indicate the appropriate program by putting an "X" in the proper box. This form is also to be used as a proposed budget for each training project or course, and a modification of it (OE 4000(a), see Item 450) is to be the report used in making claims for reimbursement. When Form OE 4000(a) is used for reimbursement claims, an "X" should be placed in the box titled "partial claim" or "final claim", whichever one applies.

In making estimates, all proposed expenditures should be rounded off to the nearest dollar. In submitting claims for reimbursement, actual cost figures should be used.

* EACH PROPOSED EXPENDITURE MUST BE CLEARLY EXPLAINED ON SUPPLEMENTARY SHEETS * ATTACHED TO THIS FORM (OE 4000) WHEN USED AS A BUDGET.

When Form OE 4000(a) is used for reimbursement claims, disregard the requests below for supplementary sheets unless they are necessary to explain special items in the claim.

1. INSTRUCTIONAL SERVICES (insert total sub-items a through e).

   1a. Salaries: Include only salaries of instructors. On separate sheet attach for the budget, data on classification, rate of pay, time, and total of each salary.
   1b. Instructional Supplies: Include instructional supplies used in the teaching-learning process whether or not consumed. Include also shipping, cartage, and sales tax. On separate sheet for the budget, give quantity and totals. Supplies need not be itemized; a representative list will suffice.
   1c. Rental of Instructional Equipment: No charge may be made by local public school agencies for the use of equipment already available in public training facilities. Include in this category only the cost of rented equipment that is not publicly owned, and attach for the budget, a supplementary statement describing the types of equipment and the unit and total cost of such rental.
   1d. Local Supervision: Charges for local supervision should be shown here only when the supervisory personnel are directly responsible to and employed by a local school district or administrative unit other than the State

Board for Vocational Education. Allowable local supervision costs are: salaries of supervisors, salaries for related clerical personnel, transportation costs of supervisors, and miscellaneous office supply costs, communications, etc. On separate sheet for the budget, give details of proposed charges.

1e. Guidance and Counseling Salaries: Include amount budgeted for the following: Professional and staff salaries and clerical salaries.

1f. Other Allowable Items: Include such other salaries as teacher assistants, toolroom keepers, and shop assistants. For the budget, list all these items on separate sheet.

2. FIXED CHARGES (insert total sub-items a through c).

2a. Rental of Non-public Space: Include rental cost of classroom or other space in non-public buildings (no publicly owned buildings, regardless of the agency that owns them, can be rented). If remodeling of rented space is required enter such costs here.

2b. Employer Share of Employee Benefits: State and/or local share of cost of employee benefits program paid by employer such as social security, retirement, and health insurance.

2c. Other Fixed Charges: Include other fixed charges directly attributable to approvable training courses.

3. EQUIPMENT MAINTENANCE AND REPAIR (insert total sub-items a through b).

3a. Repair and Servicing of Equipment: Include only charges directly identifiable and attributable to this course, such as materials used in repair, salaries of repair personnel, and contracted repair services on instructional equipment.

3b. Other Maintenance and Repair: Other maintenance and repair is limited to damage of public school equipment caused by this course and not covered by insurance.

4. EQUIPMENT PURCHASE (insert total sub-items a through d). Application will not be considered complete unless the budget is accompanied by a descriptive list of the equipment that will be purchased (including quantity, unit price, and total price.)

4a. Initial Purchase of Instructional Equipment: Include equipment with a unit cost or fair value of $50.00 or more. The definition of equipment and criteria for distinguishing equipment from supplies is found in the California School Accounting Manual.

4b. Small Tools and Minor Equipment: Include equipment with a unit cost of less than $50.00.

4c. Minor Remodeling of School Plant: Remodeling or improvement to buildings incidental to this course may be reimbursed only where such improvement takes place within the existing floor area. Applications for minor remodeling expenses on the budget must be accompanied by a detailed justification, explanation, and estimated cost. Where wiring and installation of equipment is not a part of remodeling, such cost is charged to the initial purchase cost of the equipment.

4d. Other Capital Expenditures: Other capital expenditures not included in 4a, 4b, or 4c.

5. OTHER COSTS NOT ELSEWHERE CLASSIFIED (insert sub-items a through e).

5a. Utilities: Costs for utilities include heat, water, gas, lights, power, and telephones where each is directly identifiable with and attributable to this course.

5b. Custodial or Janitorial Salaries: All salaries for operation (not maintenance) of the school facilities attributable to this course.

5c. Tuition Fees, Other Incidental Student Charges: Where tuition must be paid, include reasonable charges for fees and laboratory materials, for a trainee, with a statement attached describing the basis upon which the charge is made and the rate per day per trainee.

5d. Trainee Transportation: (ARA only).

5e. Other Miscellaneous Costs: Include transportation of trainees and equipment from classroom to areas that are required to fulfill training requirements. A description of all costs listed here must be given on a separate sheet for the budget.

6. TOTAL COSTS OF THIS COURSE (PROJECT). This is the total of lines 1 through 5, regardless of the source of funds.

7. DETERMINATION OF FEDERAL FUNDS (for Budget) and AMOUNT CLAIMED (for reimbursement). Insert the portion of line 6 that is to be reimbursed from federal funds. If in doubt as to the portion reimbursable, contact the Regional Supervisor. For the Budget, if MDTA or ARA trainees in this course or project are enrolled in an existing course financed in part by other Federal funds, the total of all such Federal funds is reported on line 7 and a statement is attached to this budget identifying each Federal fund involved and explaining the basis for the proration between such funds.

8. For budget, report on line 8 the total State funds.

9. For budget, report on line 9 the total local funds.

California State Department of Education
Vocational Education
Form VEMDT-1
(1/65)

APPLICATION FOR APPROVAL OF TRAINING PROJECT UNDER THE MANPOWER DEVELOPMENT AND TRAINING ACT OF 1962

Name of School ______________________________

Name of District ______________________________

Address ______________________________
Street or Rural Route City

Project Title ______________________________
____
____

The attached descriptive and fiscal information is a firm proposal to conduct the training project outlined herein. If approved, this training project will be conducted in a manner consistent with the intent of the Manpower Development and Training Act of 1962 (Public Law 87-415) and with the requirements of the implementing agreement between the Office of the U. S. Commissioner of Education and the California State Department of Education. The Assurance of Compliance with Title VI of the Civil Rights Act of 1964, dated ______________ (Month Day Year) applies to the application submitted herewith.

Signature of Superintendent or Designate ______________________

Date ______________________

Future correspondence regarding this program should be addressed to:

Name ______________________

Title ______________________

California State Department of Education
Vocational Education
Form VEMDT-2
(1/65)

STATE OF CALIFORNIA
DEPARTMENT OF EDUCATION

APPLICATION FOR APPROVAL OF TRAINING PROJECT UNDER THE MANPOWER DEVELOPMENT AND TRAINING ACT OF 1962

FROM

____
Name of Non-Public School

____

____
Address

Project Title: ____

____

The attached descriptive and fiscal information, Forms MDT-2, OE-4000, with supplements and training plan Form OE-4014, is a firm proposal to conduct the training project outlined therein for ____ Section__ of _____ students, per training plan schedule. If approved, this training project will be conducted in a manner consistent with the intent of the Manpower Development and Training Act of 1962 (Public Law 87-415) and with the requirements of the implementing agreement between the U. S. Commissioner of Education and the State Department of Education. The Assurance of Compliance with Title VI of the Civil Rights Act of 1964, dated ________________ applies
Month Day Year
to the application submitted herewith.

The Provisions on the reverse side hereof constitute a part of this application.

____
Name of Non-Public School

By __________________________________ Date _______________

Title _________________________________

Future correspondence regarding this program should be addressed to:

Name _______________________

Title _______________________

1. The School agrees to indemnify and save harmless the State, its officers, agents and employees from any and all claims and losses accruing or resulting to any and all contractors, subcontractors, materialmen, laborers and any other person, firm or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this contract, and from any and all claims and losses accruing or resulting to any person, firm or corporation who may be injured or damaged by the School in the performance of this contract. The School shall provide necessary workman's compensation insurance at the School's own cost and expense.

2. The parties hereto agree that the School, and any agents and employees of the School, in the performance of this agreement, shall act in an independent capacity and not as officers or employees or agents of the State of California.

3. The State may terminate this agreement and be relieved of the payment of any consideration to the School should the School fail to perform the covenants herein contained at the time and in the manner herein provided. In the event of such termination the State may proceed with the work in any manner deemed proper by State. The cost to the State shall be deducted from any sum due the School under this agreement, and the balance, if any, shall be paid the School upon demand.

4. The agreement is not assignable by the School either in whole or in part.

5. Time is of the essence of each and all the provisions of this agreement, and the provisions of this agreement shall extend to and be binding upon and inure to the benefit of the heirs, executors, administrators, successors, and assigns of the respective parties hereto.

6. It is mutually understood and agreed that no alteration or variation of the terms of this contract shall be valid unless made in writing and signed by the parties hereto, and that no oral understandings or agreements not incorportated herein, and no alterations or variations of the terms hereof unless made in writing between the parties hereto shall be binding on any of the parties hereto.

PLICATION FOR OCCUPATIONAL TRAINING
IDER MDTA: INSTITUTIONAL

Project No.____________________

Date________________
MDT-1________________

r Market Area: Name______________________________ No.__________

cal Office (or Area) Name______________________________ No.__________ State CALIFORNIA

aining Agency:____
Name Address State

aining Facility:____
Name County Cong. Dist. State

A. Occupation______________________________________ D.O.T. Code____________

B. There is reasonable expectation of employment for__________trainees, of whom all are unemployed.

Training Project Information - Summary

. Length of Course	Proposed	Approved
Total Number Hours		
Hours Per Week		
Total Number Weeks		

B. Training Schedule				
Section Number	1	2	3	4
Beginning Date				
Completion Date				
Number Trainees				

C. Average Duration:__________________ D. Total Weeks to be Paid__________________

Estimated MDTA Share of Project Costs -- Summary

Item	Proposed			Project Approval			
	Number of Trnees 1	Cost		Number of Trnees 4	Total Cost 5	Authorization FY 19__ 6	Contingent Next Fiscal Year 7
		Avg. Per Trainee 2	Total 3				
tal Estimated Cost	xxx	xxx		xxx			
Training (HEW Incl.A.I.)							
1. Local Supervision	xxx	xxx		xxx			
Allowances--Total							
1. Training							
a. Family Head							
b. Youth							
2. Subsistence							
3. Transportation							
ES Project Admin.	xxx	xxx		xxx			
1. Selection and Placement							
2. Allowance Payment							

T 2 Rev. 2 (3-63)

State of California
Department of Employment

Certification and Recommendation

The undersigned certify that (1) there is a legitimate need for training in the occupation identified in this project, and (2) that the provision of this training will not assist in relocating employing establishments from one area to another within the meaning of Section 306(b) of Public Law 87-415. We recommend approval of this training proposal.

Local Office Manager Date

Director of Employment Date

The undersigned certify that a satisfactory institutional training plan has been prepared and that neither the State nor the locality has reduced or will reduce its own level of expenditure for vocational education and training for reasons in any way relating to Public Law 87-415. We recommend approval of this training proposal.

Training Agency Representative Date

State Dir. for Voc. Ed. Date

6. Approval

The undersigned duly authorized representative of the U. S. Bureau of Employment Security finds that this training project is well substantiated as to evidence of suitable occupational shortage, availability of trainees, and reasonable assurance of employment for persons who satisfactorily complete the course; and approves the State employment security agency budget as shown in Items 3.B. and 3.C., Column 6, and in attachments.

BES Regional Representative Date

The undersigned duly authorized representative of the U. S. Secretary of Health, Education, and Welfare approves the training plan and budget of this training project and authorizes the State Vocational Education Agency to expend funds for training as shown on the face of this form and in the attached budget.

HEW Field Representative Date

The undersigned duly authorized representative of the U. S. Secretary of Labor approves this training project and requests the U. S. Department of Health, Education, and Welfare to provide training for the number of trainees stipulated in Item 3.A., Column 4, and the U. S. Bureau of Employment Security, to authorize expenditures in the amounts stipulated in Item 3, Column 6, to implement this training project, identified as OMAT Project No.__________________.

OMAT Field Director Date

NOTIFICATION OF OCCUPATIONAL TRAINING NEEDS
UNDER THE MANPOWER DEVELOPMENT AND TRAINING ACT

Date________________
MDT-1 No.________________
MDT-1 Rev. No.____________

Labor Market Area____________________ (name) __________ (number) ________________ (county or counties)

Local or Area Office__________________________ (name) ________________ (number)

1. Occupation_____________________________ (title) ________________ (D. O. T. Code)

   a. Description of occupation:

   b. Training objective:

   c. Performance requirements:

2. Estimated number of workers needed over the 12-month period:________________

3. Estimated potential number of workers available for training:________________

   a. Personal characteristics of potential trainees:

4. Wage rate or range of rates at which trainees are expected to be employed____________________ per__________________

The undersigned has determined (1) that wage rates, hours, and conditions of work in the jobs for which training is needed conform with standards in the area of employment; (2) that the occupational shortage is not due to restrictive hiring practices; (3) that there is a reasonable expectation of suitable employment for______________ trained persons using skills acquired through training.

Recommended for Training Proposal:

____
Local Office or Area Manager

Approved:

____
Director of Employment

MDT-1 Rev. 2 (3-63) NOTIFICATION OF OCCUPATIONAL
TRAINING NEED UNDER MDTA

State of California
Department of Employment

MDT-1 - SUMMARY TABLE - LABOR MARKET ANALYSIS OF OCCUPATIONAL NEED

Item			Number
1. Demand and supply during next 12 months			
a. Demand within 12 months			
(1) Expansion needs			
(2) Replacement needs			
		Total	
b. Supply within next 12 months			
(1) Unemployed persons currently available and qualified for the occupation			
(2) Persons expected to complete training in existing facilities or on the job			
(3) Other entrants in occupation			
		Total	
c. Training requirements (a-b)			
2. Immediate shortages			
a. Current vacancies			
b. Job openings in local office			

COMMENTS (See MDTA Handbook VII - 6b & 6c - use additional pages if necessary):

C. FACTORS TO CONSIDER

An effective training plan can be developed only after the person preparing it clearly understands the objectives of the project and the characteristics of the trainees, as they are stated in the Request for Training, Form MDT-1. He must have a complete knowledge of the facilities and equipment available. In formulating the plan he has myriad factors to consider. Perhaps the most helpful material will be a knowledge of previously developed plans for occupations akin to the one with which he is concerned and of the degree of success achieved by each. Major factors in the design and development of the training plan and proposal are discussed in broad terms in paragraphs 1-4 following.

1. Training Goals

The developer of an MDTA project starts with a close examination of the sections of Form MDT-1 entitled Description of Occupation, Training Objective, and Performance Requirements. These contain the job entry skills that each trainee must be able to demonstrate upon completion of the project. No item must be neglected, nor changed, without concurrence of employment office representatives, who have established the necessity of each of the criteria.

2. Trainee Characteristics

The Personal Characteristics of Potential Trainees, shown in the MDT-1, provide the only picture available of the raw material from which the finished product must be produced. These characteristics are of necessity presented on a group basis,i.e., range of ages, range of previous education, range of experience in general terms, and range of present skills in some areas. School personnel may find that the ranges are in some cases so wide as to preclude development of an effective plan which covers the extremes. It may be apparent that the prospective group has disparities of skill levels which are not compatible with the schedule sought. Either the less adept will not be able to progress fast enough in a short schedule, or those better prepared will become bored at the slow pace, lose interest, and drop out. In this situation, or others of similar potential impact on the success of the project, changes in the training order may be sought in order to improve the homogeneity of the group to be trained.

3. Facilities and Equipment Available

The design of the training plan must be influenced also by the facilities and equipment which are available for use during the project, whether and to what extent their use must be shared, and whether they are adequate for the purpose. In cases of inadequacy, the budget may provide for the purchase or rental of necessary special equipment, or for minor remodeling of public buildings to provide suitable space. However, inclusion of costs of regular classroom furniture, of alterations to buildings not publicly owned, and many other items are not allowable. (A more complete listing may be found in the MDTA Manual, Item 353.) In planning augmentation of facilities and equipment through project funds, care must be taken lest the cost of training per pupil become excessive.

4. Schedules

The daily and overall schedules for the project require consideration of certain factors affecting the daily lives of the prospective trainees, as well as the availability of facilities and instructors and the total length of the course. Reports from completed MDTA projects indicate that the effect of the training schedule on personal factors has a decided bearing on dropout rates. For example, a trainee group that includes many mothers who have children of school age will be handicapped if the project schedule does not conform to the public school schedule as to hours, holidays, and vacations. The availability of public transportation is also important to many of the trainees. In general, the project training schedule can markedly affect the regularity of attendance and the dropout rate.

D. CONTENTS AND THEIR SOURCES

1. Training Plan and Course Outline

The training plan is a presentation of the subject offering and the number of hours allowed for each subject, with daily and weekly time blocks. The plan should include all the areas that will be covered in each subject. The training plan should be an outline complete enough so that the teacher can easily use it in preparing daily lesson plans.

An effective training plan can be developed only after the person preparing it clearly understands the objectives of the project and the characteristics of the potential trainees. To be adequate, the plan must be designed to provide the trainees with opportunity to develop from the level of achievement at which they enter training to that represented by the job entry requirements specified on the MDT-1.

The developer of the project should work with a local advisory committee (see MDTA Manual, Item 190) composed of representatives of employees, employers, and appropriate government agencies.

a. Basic curriculums. Since a preponderance of business education projects under MDTA have thus far been for the development of stenographers and clerk-typists, it has been possible to develop, from the experience of successful projects, recommended basic curriculums for these two areas. They are presented as preliminary guidelines for designers of training plans in these and closely allied occupations.

At MDTA conferences devoted to improvement of instruction, conducted by the Bureau of Business Education, representatives of public and private schools agreed upon course content and the ranges of time within which allocations are to be made to the stenographer and clerk-typist units of instruction. These suggestions for time and units are points of departure from which the person developing an MDTA project may proceed to design a training plan to meet the training objectives specified on the MDT-1.

Stenographer	Hours	
Typewriting, beginning level	240 - 280	
refresher level	160 - 180	
Shorthand	280 - 325	
English (Business English)	120 - 160	
Office Practice	125 - 150	
Business Math & Record Keeping	80 - 100	
TOTAL HOURS	845 - 1015	(beginning)
	765 - 915	(refresher)

Clerk-Typist	Hours	
Typewriting, beginning level	240 - 280	
refresher level	160 - 180	
Business English	100 - 120	
Office Practice	150 - 200	
Business Math & Record Keeping	130 - 190	
TOTAL HOURS	620 - 790	(beginning)
	540 - 690	(refresher)

b. Subject descriptions

Typewriting 240-280 hours

Training in correct typewriting techniques: development of speed and accuracy; emphasis on tabulation and problem solving, business letters, business forms, and office reports.

Business Arithmetic *S 80-100 hours **C-T 130-190 hours

Review of the fundamental processes, fractions, decimals, percentages; some record keeping which includes payroll procedures.

Filing 30-40 hours

Emphasis on learning the rules for indexing and filing; alphabetic, numeric, geographic, and subject filing systems; possible emphasis on special filing systems such as the Soundex system.

Office Machines *S 20-25 hours **C-T 40-50 hours

Development of proficiency on ten-key and full-keyboard machines; and in some instances on rotary and printing calculators.

Business English *S 120-160 hours **C-T 100-120 hours

Review of grammar and sentence structure, punctuation, capitalization, spelling, correct syllabication and use of abbreviations; vocabulary building; and use of the dictionary.

Office Practice *S 125-150 hours **C-T 150-200 hours

Emphasis on receiving callers, telephone courtesy, handling incoming and outgoing mail, duplicating processes and machines, and development of proficiency in using transcribing machines.

Human Relations and Personal Grooming 20-30 hours

Physical, intellectual, social, and emotional dimensions of personality; conversation and speech, interests, manners, dress and grooming.

Business Correspondence *S 30-50 hours

Training in the composition of effective business letters; includes letters making reservations, referring matters to others, making appointments, thank you letters, transmittal and follow-up letters.

Shorthand and Transcription *S 280-325 hours

Emphasis on speed and accuracy in reading and writing shorthand from dictation; development of skill in producing mailable typed business letters and articles.

*S - Stenographer
**C-T - Clerk-Typist

c. Course structures. Table 1 lists the 22 fundamental units of instruction which are considered to be essential in the stenographic curriculum. These units are organized under six courses, according to the suggested curriculum of the Bureau of Business Education. The six courses are also listed horizontally at the top of the page. By adding a seventh column to the six courses listed at the top, it is possible to show other places where each unit can be fitted into the total plan. An "X" is used to indicate where the unit is presented in the suggested curriculum. In the review of a number of projects it was found that many schools have taught one or more of the 22 units (listed vertically) under another course title or in a separate course (both listed horizontally). With an "O" to designate the shifting of a unit to another course, and an "A" to designate a separate course, the table shows where the required units are offered in a wide range of training plans. For example, business record keeping is set up as a separate course in the suggested curriculum and is so indicated by an "X" on the final line. The "O's" listed under office practice and business mathematics show that certain plans incorporate business record keeping into other allied courses.

The important thing is that the whole program be organized to include all of the necessary constituent parts. If in the judgment of the training agency a stronger curriculum can be obtained by shifting certain units of instruction into other courses, the training plan may of course be so written.

Table 2 depicts the same relationships for the clerk-typist curriculum.

Table 1
Variations in the Course Structure of MDTA Stenography Plans

Meaning of symbols:

X The unit is taught here in the suggested curriculum

O Certain projects offer the unit in another course

A Certain projects offer the unit as a separate course

	TYPING	SHORTHAND	OFFICE PRACTICE	BUSINESS ENGLISH	BUSINESS MATH	RECORD KEEPING	SEPARATE COURSE
TYPING							
Fundamentals	X						
Production	X			O			
Transcription	X	O	O				
SHORTHAND							
Fundamentals		X					
Theory		X					
Skill Building		X	O				
OFFICE PRACTICE							
Fundamentals of Filing			X				A
Basic Telephone Techniques			X	O			
Fundamentals of Duplicating Equipment			X				
Use of Materials and Supplies			X				
Fundamentals of Standard Machines			X		O		A
Adding Machine			X		O		
Rotary Printing Calculator			X		O		
Preparation of Required Reports	O		X	O			
Principles of Human Relations			X	O			
Personality Development			X	O			
Importance of Good Grooming			X	O			
BUSINESS ENGLISH							
Basic English Grammar				X			
Basic Spelling				X			
Business Terminology				X			
Business Letter Writing	O			X			
BUSINESS MATH							
Fundamentals of Arithmetic					X		
Adaptation of Math to Machines			O		X		
BUSINESS RECORD KEEPING			O		O	X	

Table 2
Clerk-Typist Curriculum

	TYPING	OFFICE MACHINES	OFFICE PRACTICE	BUSINESS ENGLISH	BUSINESS MATH	RECORD KEEPING	OFFICE RELATIONS
TYPING (3)							
Fundamentals	X						
Production	X						
Transcription	X		O	O			
OFFICE MACHINES (3)							
Basic Adding Machine		X	O				
Rotary Printing Calculator		X	O				
Duplicating Machines		X	O				
OFFICE PRACTICE (5)							
Use of Materials and Supplies			X				
Fundamentals of Filing			X				
Basic Telephone Manners			X				O
Business Organization			X				
Duplicating Equipment		O	X				
BUSINESS ENGLISH (4)							
Basic English Grammar				X			
Basic Spelling				X			
Business Terminology				X			
Business Letter Writing	O			X			
BUSINESS MATH (4)							
Fundamentals of Arithmetic		O			X		
Basic Payroll Math		O			X		
Math in Inventory Processes		O			X		
Adaptation of Math to Machines		O			X		
BUSINESS RECORD KEEPING (1)			O		O	X	
OFFICE RELATIONS (4)							
Principals of Human Relations			O				X
Fundamentals of Correct Speech			O				X
Personality Development			O	O			X
Good Grooming			X				X

d. Sample training plan. Samples of a wide variety of representative training plans that have been developed and carried out, in response to specific training orders, by training agencies throughout California, are available and may prove helpful to designers. A single example is given following Part III; others are listed in the Appendix.

2. Facilities and Equipment

a. Space. Many different types of buildings are used to house MDTA business education projects. Some are housed in regular school buildings, others in Quonset huts, portable classrooms, and rented space ranging from office-type rooms to remodeled warehouses.

The training proposal must clearly show that adequate and suitable space is or will be made available. The training plan designer must therefore determine the space needed for his project and the optimum arrangement of such space. Next he must determine the characteristics of the space that is to be made available. Finally, by a process of arranging, rearranging, compromising, and adapting he should arrive at a solution that will be satisfactory and will involve a minimum expenditure of alteration funds. This may be presented verbally or pictorially in the training plan; the presentation must clearly support the premise that sufficient and suitable space is available.

b. Training equipment. The physical equipment to be used by the instructors and by the trainees during the course not only affects the space planning, but the schedule and budget planning as well. If the quality and quantity of equipment available--business machines, projectors, slides and moving pictures, record players, tape systems, and the many other items needed--is not in question, the course plan is greatly simplified, as is the budget. If there is any discrepancy between the equipment needed and that available it is again the task of the project planner to achieve such adjustments in the course plan, schedule, or equipment utilization scheme as will provide a sound successful project overall.

Brief descriptions of some of the items profitably used in business education projects follow. A detailed listing of many applicable teaching aids and their sources is contained in the Bureau publication Office Procedures: A Teachers' Manual, to which access may be obtained through the Bureau or its regional representatives.

(1) Equipment

- Typewriters. There should be a variety for the students--electric and manual, standard and proportional spacing.
- Electronic Classroom. Used primarily in speed development and specialized dictation in shorthand but has possibilities for use in giving shorthand tests and in typewriting--drills, instructions for specialized typing (technical).

- Tape Recorder. For doing homework assignments in shorthand and for speed development. Also for specialized dictation (medical).
- Overhead Projector. Used in accounting class where transparencies to go with text are usually available from textbook companies and additional ones can be made. Also usable in shorthand classes to give previews, drills, etc. Overlays can be made of brief forms, phrases, and the like.

(2) Teaching aids

- Skill Builder. Filmstrips can be obtained for the following:

  Typewriting--keyboard introduction in beginning class

  Typewriting--speed and accuracy development

  Shorthand--reading, writing, and transcribing shorthand

  Other strips are available--mathematics, filing, etc.

- Controlled Reader. Used in business machines courses for learning and developing touch control of the ten key adding machine.
- Filmstrips. Used in the following:

  Filing--available coordinated with some texts.

  Office Practice--a secretarial set is adaptable to any text used.

- Records. Used in shorthand for speed development and for office-style dictation and transcription units. Records in specialized dictation (legal and medical) and in spelling are available.
- Programmed Texts. Provide for flexibility in program.

  Programmed Mathematics has been used since the start of the MDTA program and allows the instructor to teach mathematics and office machines at the same time. This makes full utilization of available machines possible. Programmed English has been used, as has also programmed Correspondence.

3. Budget

The estimated cost for each project is presented in a prescribed format, which becomes upon approval the budget for that project. A copy of Form OE 4000, used for this purpose, together with the instructions for preparing it, is included elsewhere in this book. The active assistance of the finance office that serves the training activity will be necessary and invaluable in the completion of an accurate cost estimate. The results of experience in other projects, which may also prove helpful, may be obtained through the regional representative.

Item 353 of the MDTA Manual contains lists of allowable and nonallowable budget items. A sample completed Form OE 4000 for a business education project is also given in the Manual (Item 420, pp. 7-10).

4. Methods

The course plan outline requires the inclusion of material on the methods of instruction and of evaluation to be used in the project. In many instances no departure from long-established methods and procedures will be needed. In others, consideration of the characteristics of trainees will give rise to the introduction of certain innovations or unique methods believed better suited to the project. Such new methods, equipment, or procedures should be explained sufficiently in the proposal to enable the reviewing authorities to pass upon them.

E. SPECIAL TRAINING PLANS

In MDTA projects the California State Employment Service is responsible for selecting trainees and for deciding upon the degrees of skill, understanding, and knowledge required in the occupation for which training is requested.

1. Problems

Some requests for training which have recently been sent to the Bureau of Business Education show such a wide gap between the academic and ability levels of potential trainees entering the projects and the goals specified by the employment office that the chances for successful outcomes in these projects are extremely uncertain. An example of such a situation is a project that has as its goal the training of clerk-typists. The potential trainees for this project are persons who lack the ability to pass the employment office's test battery, which has been required previously of all trainees. The trainees have little or no office experience. In the case of such a project, it is not known if these trainees can be developed into satisfactory clerk-typists, and many problems are created, some of which are listed below.

a. Time limit. MDTA training projects are limited to a maximum of seventy-two weeks. Requests for training, initiated by the Department of Employment, sometimes ask that trainees with sixth grade abilities be able to compete with high school graduates for office occupations by the end of an MDTA training project. Probably some trainees will meet the objectives of the training, and for them the experience would have been well worthwhile. Yet most trainees cannot be expected to advance several academic years in slightly more than a year.

b. Dropouts. Training projects designed to fill in wide gaps between trainee ability and occupational goal must be of long duration if they are to have any possibility of success. Experience has shown that MDTA projects that extend over several months have somewhat greater percentages of dropouts than do shorter projects. Trainees with low educational and cultural backgrounds tend to drop out in greater proportions than persons of more satisfactory backgrounds. When the two factors occur together, the dropout rate in such a project can render the project uneconomical.

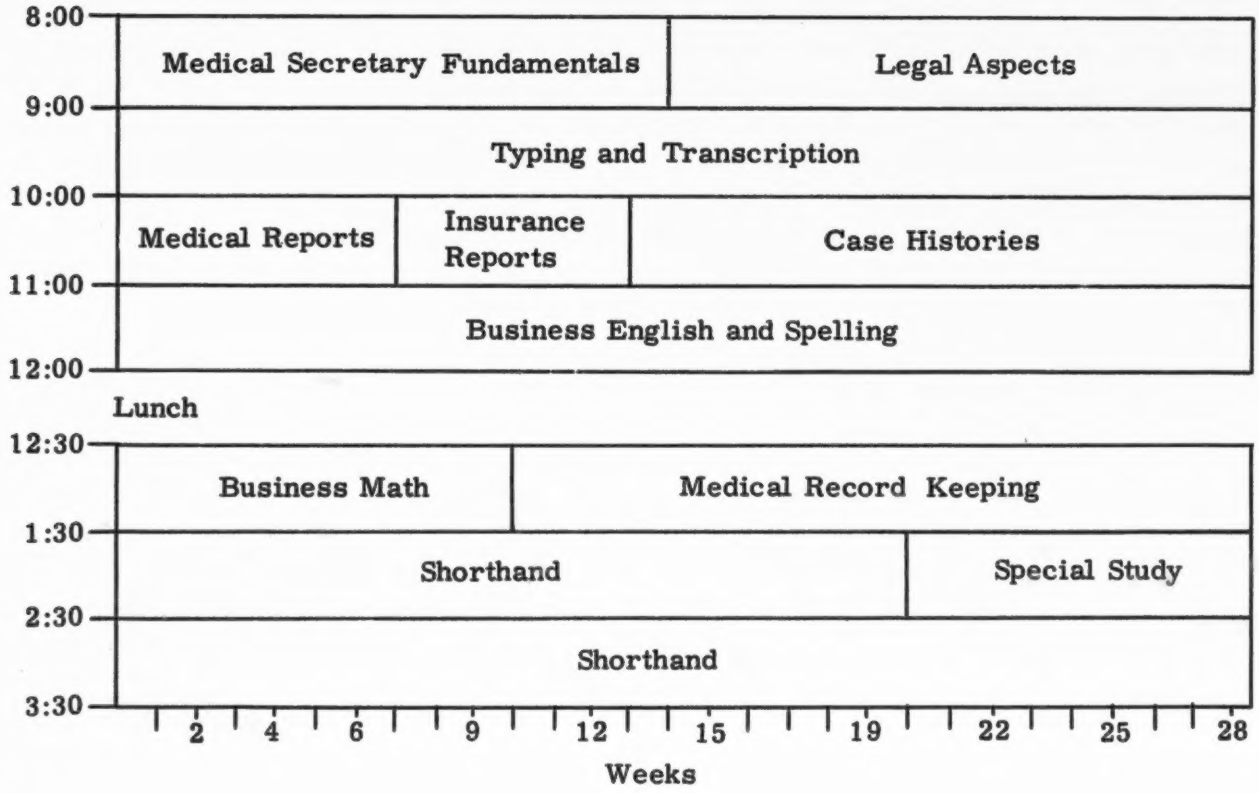
c. Cost. Projects with wide differences between where the trainee is when he enters training and where he is expected to be by the time he completes it will tend to be much more expensive than those projects where the gap is narrower. The additional weeks of training required for this type of project will result in increased cost because of additional instructional hours, if for no other reason. In the event that a plan designed for an unrealistic training order results in a large number of student dropouts the cost per student is increased during the latter stages of the project. The increased cost per student is in direct proportion to the number of dropouts.

2. Identification of Special Projects

Special projects, with wide variances between trainee entry ability and the goals of the course, are often identified in the title of the project by the use of the words "including basic education," or by some other means. Such identification is helpful in separating these special projects from the standard ones, but it is not adequate. Special projects should be clearly distinguishable from others so that persons who are not familiar with MDTA can understand at a glance that these projects are different, that they must run for longer periods of time, and that higher costs per trainee are to be expected.

In many such cases, the original MDT-1 will require amendment or revision. Action to have it changed should be initiated at the local level as soon as the developing training plan indicates the need. Consultations with the Department of Employment representative and full utilization of local committees provide the channels to accomplish such changes.

Schedule - Medical Secretary



Training Plan
MEDICAL SECRETARY

1. General Information

1.1	Occupational Title	Secretary (Medical)	1-33.01
1.2	Starting Date	Three weeks after approval or about February 10, 1964, and complete August 21, 1964. The second section will begin after completion of this section and will be submitted on a new proposal about July 1.	
1.3	Length of Course	Through consultation with members of the medical profession, representatives of the California Department of Employment, representatives of the California Department of Education, the course was determined to require 980 hours of classroom and clinical instruction. As a medical secretary in a small office often works at least 7 hours a day, it was determined that instruction should as nearly as possible reflect these working conditions--that is 7 hours a day of instruction or 35 hours weekly.	
1.4	Total Number of Sections	One section of 30 students.	
1.5	Schedule of Sections		
	Section 1	To start February 10, 1964, and complete August 21, 1964.	

1.6 Name of Agency Supervising Course

The course will be conducted under the supervision of the Hayward Unified School District. Supervision will be done by the Vocational Coordinator of the district and by the teacher-supervisor from the teaching staff.

1.7 All students will be unemployed.

1.8 This training will be held at 22300 Foothill Boulevard, Hayward, until the remodeling is complete at 26316 Hesperian Boulevard, Hayward.

1.9 Remodeling

The school we now use for our clerk-typist and steno-secretary program has been condemned and will be sold before our medical secretary courses are completed. Also, we anticipate continuing with more classes of clerk-typists and steno-secretaries when these complete due to the increasing growth of this community. We have a three-year old building which has classroom partitions but they are not finished. In order to make these classrooms adequate, some remodeling will be needed. The cost of this remodeling will be $3,500.00. (See outline attached to Form OE 4000.)

2. Course Information

2.1 Entrance Requirements from MDT-1

(1) All trainees will be women with a minimum of a high school education.
(2) The age range is estimated to include approximately 10% between 18 and 21 years, 80% between 22 and 44 years and 10% between 45 and 50 years.
(3) Ability to type 25 words per minute accurately.
(4) Attain the recommended minimum scores on SATB B 215.
(5) Demonstrate by appearance, personal presentation, and attitude that there is a good potential for successful job performance after training.
(6) Priority factors for selection as set forth by PL 87-415.
(7) All screening to be done by the Department of Employment.

2.2 See list of books and supplies attached to Form OE 4000 for instructional manuals, textbooks, and references to be used by trainees.

2.3 The course objective is to prepare trainees to successfully assume the varied duties and responsibilities of a medical secretary as outlined in the description of the occupation. Training will be directed toward developing proficiency in the use of office machines and equipment, and emphasis will be placed on the instruction of medical terminology. It will also include office procedures and ethics typical of the medical profession as well as limited nursing and laboratory tasks.

2.4 Records of students to be kept are:

- Attendance
- Progress
- Attitude
- Speed for typing and shorthand
- Punctuality
- Required government records
- Plus all records needed for reference for placement
- Completion

2.5 Course Outline:

The course outline is shown in the attached block diagram. We will use 2 instructors, each teaching 5 hours per day with 2 hours of preparation time. The students will have 7 hours of classroom instruction. Homework will be assigned and graded.

2.5.1

The specific skills to be developed under each title heading are:

(1) Medical Secretary Fundamentals--a survey of anatomy and physiology; origin, meaning, and application of terminology; ethics, interdepartmental relations, personal conduct, public relations, and telephone procedures.

Additional duties commonly include sterilizing instruments, preparing patients for examination, checking heights and weights, and making certain types of laboratory tests.

(2) Legal Aspects--parent, nurse, doctor, patient relations, adoption, etc.

(3) Shorthand--study shorthand outlines for medical terminology; develop shorthand speed.

(4) Medical Reports--interpretation of medical records and forms including proper filling out of insurance forms. Correct filling in of case histories and their meaning.

(5) Transcription--develop skill in transcribing dictation of medical reports, articles, case history and correspondence from a transcription tape or shorthand notes.

(6) Office Practice and Machines--develop skills in the use of office machines, review and practice in office filing principles and systems.

(7) Business English--review of basic grammar, sentence construction, capitalization, and punctuation. Review spelling and pronounciation, definition of medical vocabulary, composition of routine correspondence.

(8) Business Math--review of basic mathematics required for a medical secretary as payroll, patient billing, taxes.

(9) Business Record Keeping--be able to handle the financial transactions of the office, maintaining records, billing patients, and keeping these records in up-to-date form.

(10) Typing--speed and accuracy drills, training and practice in typing technical material containing medical terminology, medical reports, etc. Develop a typing speed of 55 wpm.

(11) Special Study--this time is left open until we have tested the students and watched their progress. When their areas of weakness are known, they will be given special attention at that time.

2.5.2

In addition to books listed and attached to Form OE 4000, the following equipment is already on hand and will be utilized:

Marchant Calculator
Printing Calculator
Duplicating Machine
5 adding machines
Combination dictaphone-transcriber
Filing cabinet
Stenorette Combination
Stenorette Transcriber
Stenorette portable dictating machine
Spirit Duplicator
Dictaphone Transcriber
Dictaphone Dictator
1 hospital bed
1 scale and height unit
1 overhead projector & transparencies
16 mm projector and screens
35 mm projector

3. Instructor Information

3.1 Two Full-Time Instructors

3.2 We certify that the instructors will meet the requirements and standards for a regular California credential.

3.3 Each instructor full time 7 hours a day, 5 days a week for 28 weeks
at $5.50 per hour = 7 X 5 X 28 X 5.50 = $ 5,390.00
2 instructors = $10,780.00

Part IV

IMPLEMENTATION AND FUNDING

A. IMPLEMENTATION

1. Approval

Approval of a recommended MDTA project proposal is given, ex officio, by the members of the Board of Review, composed of authorized representatives of the following:

State Director of Vocational Education
State Department of Employment
U.S. Department of Labor
U.S. Department of Health, Education, and Welfare
U.S. Bureau of Employment Security

2. Notification

The State Director of Vocational Education notifies the training agency, by a Letter of Acceptance, that a project has been approved. To this notification is attached a copy of the proposal as approved.

3. Starting Date

The actual starting date is established after consultation with the local manager of the Department of Employment.

4. Initial Actions

a. The training agency designates the persons authorized to sign interdepartmental forms and reports. An authorization card (Form MDT 111) is provided to the Department of Employment for those persons authorized to certify training allowance vouchers.

b. The Department of Employment provides each selected trainee with a referral form (ES 950B or ES 959) notifying him where and when to report for training.

c. The training agency confirms with the local office of the Department of Employment the number of trainees ordered to report, and completes preparations to start training at the appointed time in accordance with the approved training plan.

B. FUNDING

1. Control

Funds to reimburse the training agency for expenditures in accordance with the approved budget are administered by the State Department of Education.

2. Claims

Claims for reimbursement are submitted by the training agency through the regional supervisor. They may be submitted at intervals during the project, or upon its completion, using Form OE 4000(a). Each claim should represent actual expenditures within the approved budget. In exceptional cases advances of funds may be obtained.

3. Records

Each training agency must keep separate records of expenditures for each MDTA project. The records must be adequate to fulfill the reporting and audit requirements, and must be retained for three years or until the agency is notified that the records are not needed or that the federal audit has been completed.

4. Final Settlement

Reimbursements to training agencies are not considered final settlement until the state audit has been completed.

Part V

TRAINING OPERATIONS

A. INSTRUCTION

1. Classroom Instruction

The objective of an MDTA business education project is to prepare for immediate employment. The methods of instruction must be designed with this in mind, paying special attention to the fact that these students have various interests, needs, and characteristics which differ from those of the regular student in the high schools or junior colleges. For this reason, the instructor planning to teach one or more courses should first consider the people who will face him.

a. Characteristics of MDTA trainees. MDTA trainees differ in age, occupational background, physical condition, living standards, education, ambition, mental ability, aptitudes, and attitudes. They differ from secondary school students in that they are adults, who come to classes because they need and want to. Hence, they don't take their classes, their progress, or their teachers as a matter of course. Some may have a richness of experience that the younger student lacks and be able to shed new light on old problems, theories, or facts. The MDTA instructor has a potential assistant in every member of the class.

As a rule, most grown-ups who come to MDTA classes are well-motivated, eager to learn, and very appreciative of good teaching. They are more sensitive to physical surroundings such as lighting, seating, ventilation, and heating. They like to be comfortable; they enjoy learning comparatively short units; and they usually want to cover ground rapidly.

MDTA trainees appreciate systematic business-like procedure and tangible evidence from time to time that their needs are being met. They welcome variety and like informality. They like to be treated like grown-ups with mature minds, successful backgrounds, and varied experience. They welcome a chance to laugh and a chance to relax. They come for business, but they enjoy the fellowship and congenial atmosphere always found in a good class for MDTA trainees.

Some principles considered essential to effective learning by MDTA trainees are set forth in the following paragraphs:

(1) The MDTA trainee must see immediate benefit to himself. The content of the course, whether it provides information, skills, or both, must be immediately useful to the adult. Unlike the adolescent student, he does not study for some remote, uncertain future.

(2) The MDTA trainee wants instruction, but this does not necessarily indicate that he wants what he is getting. He may want part of it or expect to get what he wants later in the course. He may question the usefulness to himself of some of the course. If the instructor is well acquainted with his trainees, he is in a position to make sure of their motivation. He will not take their interest for granted, but, as occasion requires, he will take time to develop in the minds of his students a realization of their need for the subject matter--or he will present other subject matter. Interest and motivation naturally arise from expectation of success. The thoughtful teacher will create occasion to emphasize and call attention to the student's progress (not to his lack of it) through comment, encouragement, praise, and expression of personal satisfaction in his work.

(3) The MDTA trainee wants specific, concrete, practical, life-like situations. He questions the abstract or theoretical approach. Courses in skills especially should duplicate everyday functions. Dramatizations, demonstrations, and illustrations, presented on the adult level, make the content more lifelike.

(4) The MDTA trainee requires participation in class activity. The adult student does not come as a spectator or to be part of an audience. He wants demonstration, illustration, and explanation, but he also wants to work things out for himself. If a particular step can be presented as a problem for him to solve, his interest, satisfaction, and learning are all multiplied.

(5) The MDTA trainee has experiences and interests to which new material should be related. Most adults have had experiences, contacts, or interests germane to the subject of the course that may be utilized to advantage by the teacher. One of the major characteristics of a class for MDTA trainees is its many different types of members. Because of the differences there is great need for adaptation of subject content and methods of instruction. In order that each trainee may understand each step in the development of the course, individual instruction is frequently necessary.

(6) The MDTA trainee should enjoy the instruction. The chief source of enjoyment to the trainee will be found in his knowledge that he is progressing in an understanding of the material which is presented and which he feels is useful to himself. In order to make this progress, he must learn in an atmosphere to his liking and adapted to his level. He will resent anything bordering on adolescent schoolroom discipline or restraint. The teacher will secure order and attention to instruction only because the student feels that he is securing the learning and the development that he expected when he entered the class. The trainee needs praise according to his achievement, not false flattery. He particularly wants to receive earned praise in public and to have his errors pointed out in private, with the positive stressed. Embarrassing criticism interferes with effective learning. To sum up:

> "In order that people may be happy in their work, these three things are needed: They must be fit for it: They must not do

too much of it: And they must have a sense of success in it."
--John Ruskin

b. Attributes of good MDTA instructors:

- A good instructor of MDTA trainees knows his students. The efficient instructor of MDTA trainees quickly learns his students' names and starts using them in class. In order to understand them and to work with them in the best manner, he gets information about each one's background and interests.
- A good MDTA instructor is adept in handling subject matter. In order that trainees may measure their progress frequently, the instructor organizes the work into short units. He realizes that the amount of work that students can be expected to do outside the class is limited. He makes sure that every student learns something at each class meeting and that the student himself is cognizant of this growth. He stimulates regular attendance by suggesting interesting material or activities that will be covered in the next class meeting and in future meetings. The instructor and trainee together should take stock of what has been done and what remains to be done, and together make plans to complete the unfinished work.
- A good MDTA instructor plans well. The wise instructor selects interesting material and plans helpful activities to fill the entire period. He begins the class promptly and makes the opening of the period an occasion so that students will feel that they may miss interesting and valuable information if they are late. He closes the class promptly.
- A good MDTA instructor maintains interest. A variety of procedures is necessary to maintain a high level of interest in the group. The adept teacher will vary the routine by using visual aids; by arranging for outside guest speakers especially equipped to handle a given subject; by planning special reports, demonstrations, whole or split-group discussions, and other departures from simple exposition.
- A good MDTA instructor is familiar with records and reports. A knowledge of local routine teaching duties, including preparation of attendance records and weekly and monthly reports, is necessary for the MDTA instructor. He realizes that part of the responsibility of the instructor is to complete reports promptly and correctly. He is especially careful to be accurate and on-time with reports that may affect the welfare, or pocketbook, of any student.
- A good MDTA instructor is the leader of the group; he is more than an instructor of the class. He recognizes the members of his group as adult personalities like himself and observes their distinct needs and individualities. In such a role, he creates situations in which instruction is wanted. It may be said that the teacher of MDTA should take himself very seriously in planning and preparing a lesson but

should not take himself too seriously in the classroom. In an MDTA class (and most others), humor, color, drama, and illustration aid the learning process. The instructor who is fortunate enough to have and display a natural enthusiasm in his work has a great advantage.

c. Teaching methods and devices. Figure 1 describes a teaching method which outlines four steps to be followed to ensure a complete job of teaching in any subject. Its adaptability and the success with which it has been used in MDTA business education projects prompt its inclusion here. Some devices reported by MDTA instructors to be successful in increasing student interest, participation, or achievement are briefed as follows:

- One class elects each month the MDTA Trainee of the Month. The chosen trainee acts as host, introducing guest speakers and writing thank-you notes on behalf of the class, and with helpers maintains good housekeeping.
- A coffee break or luncheon is hosted by the instructor, shortly after the training project starts. The entire group is taken to an appropriate place for a class treat. The purpose is to bring the members of the group closer together in a social situation; it also helps the instructor to establish good rapport with the class.
- Mock job interviews are conducted. Starting about four weeks prior to the completion of the training project, each trainee participates in a job interview. The setting is structured; the interview is not. The situations are varied to represent different sizes and types of businesses and different kinds and position levels of interviewers. Each trainee dresses appropriately on the day she takes her turn. A class discussion follows every interview. Frequently the interview is repeated to develop improvement in techniques.
- Role-playing is utilized to teach human relations. Varied problems with employers, fellow workers, customers, and others are presented. A discussion by the class of possible solutions follows each role-playing exercise.
- Brief creative writing is a useful device. An assignment to write a few paragraphs on such words as "Hope" or "Fear" is used. In privacy, each trainee reads aloud these paragraphs, taping them. He listens to the tape to detect weaknesses in his oral reading technique. He plays the tape the second time to compare the oral effect to the written effect. Choosing abstract words such as "Fear" or "Hope" may also bring out some information about the trainee that will prove of value to the instructor in his efforts to "reach" certain trainees in the class.
- Spelling is taught with the use of records and tapes. During the first week, the trainees are given a mimeographed list of 400 words they must learn to spell correctly. This list includes definitions, when the words are difficult. Each day new words are listened to, using a record or tape, and a test on those studied the previous day is given.

Figure 1
THE FOUR-STEP METHOD OF TEACHING

	Step	Purpose	General Methods
1.	Preparation	To get the group ready to receive your instruction; to awaken interest in the new material so that students know where they are going, believe it worthwhile to get there, and understand what they have to do.	Teach only to complete attention; find out what they know about the subject; review what they already know; make a good start.
2.	Presenting the things to be taught	To present facts, information, skills. To introduce your material and show them how to use it; to build new understandings out of the old ones, new skills out of old skills.	Tell, show, illustrate, question, demonstrate, let them discuss; present the material in easy stages; use visual aids; make the important points stand out.
3.	Application by class members	To give class members practice and to develop their ability in using facts, information, skills, and methods which you have introduced to them.	Provide plenty of practice, have students do something; question and correct errors; stress accuracy over speed; check to make sure they know it and can do it.
4.	Follow-up	To check and see if class members are performing successfully; to see if class members are actually putting into practice the things they were taught.	Test and re-teach; check their work on the job; encourage them to improve; stimulate them to use what they have learned.

- Workbook drills on several subjects are usually done in a group situation. There is usually one capable trainee who can be teamed with each one who is having difficulty. Each trainee takes a turn in reading out the problem and giving the solution.
- An overhead projector is utilized daily in a shorthand class for the instruction and for review of brief forms and simple words. In the business English class, when the trainees want to know about "who and whom," for example, this is covered immediately by using the projector. The instructor is facing the class while using the projector, and much material can be covered effectively and quickly, as compared to conventional methods.
- A slidefilm projector enables utilization of a rich source of instructional material, with and without sound accompaniment, on many topics. A technique that has proven helpful in emphasizing the message of a filmstrip is running it first with the sound, and a second time without it. This method enables the instructor to comment on salient points during the second running.
- An acetate cover and a grease pencil are used by each trainee to diagram sentences from texts or workbooks. The schematic diagramming is a visual aid which helps trainees to realize prompt, positive results in understanding grammar and sentence structure. The instructor uses the overhead projector to go over the diagramming with the class.
- Graduation planning involves learning by the trainees in several ways. The trainees work in committees, planning the entire affair. They select several of the trainees to speak, invite their guest speaker, arrange the program, and set up the physical facilities.

d. Changes in methods, content, and emphasis. In an MDTA business education project, the course plan, the derived lesson and unit plans, and the schedules should not be held inviolable. The lesson presentations must be continually reassessed in the light of each day's results. Some must be discarded, others altered, and substitutions must be made, in order to maintain a steady progress. The success of each project will be measured at its completion in terms of maximum achievement by the trainees of the planned skill levels.

2. Lectures, Demonstrations, and Displays

a. Purposes. The introduction of "guest speakers," in addition to the regular classroom instructors, on a regular or occasional basis, serves many purposes. A good speaker, a lively demonstration, or a bright and meaningful display quicken the interest of the trainees, so long as the subjects contribute to the furtherance of their desired knowledge and skills. Moreover, it enables the instruction in special subjects or phases of the course to be presented by experts or--from the trainee point of view--by people "from real life." Question and answer sessions as a part of each presentation have proven particularly valuable in making each trainee a contributor.

b. Sources and topics. Perhaps the first three guests who should be mentioned are the referral, testing, and placement officers from the State Department of Employment. Their periodic encouragement helps students to realize the interest of that Department in the project. Students are told about current employment opportunities; and should a student be faced with a problem of welfare help or assistance in home planning, these specialists are ready to aid. Other sources, too, can make significant contributions.

- During the first few days, a school administration representative orients the class on the school facilities and makes available the services of the staff to assist the MDTA group.
- Guest speakers from the community are invited. A successful secretary is included. She is usually from a local company, where she holds the position of executive or administrative secretary. She talks to the trainees briefly about good grooming, tact, and personality improvement. A question and answer session follows.

  The possibilities of presenting factual material on obtaining and holding a job in various industries by means of guest speakers are limited only by the resourcefulness of the project supervisor in obtaining them, and by the length of the project schedule. A sample activity chart for one project which included scheduled film and personal presentations on a daily basis appears in Figure 2.
- Guest speakers from the school include the person who hires the classified personnel. He spends an hour with the class. He gives a down-to-earth talk about the rules and regulations the school has for its employees; these are ground rules found in most offices. He explains the reasons that various rules were made and need to be followed. A question and answer session follows.
- Group counseling by a representative of the Department of Employment is done about half way through the program. He talks to the trainees about grooming and techniques of the job interview. He emphasizes planning of a campaign to locate and land the kind of entry job the trainee desires. A question and answer period follows.

3. On-job Practice

An additional bonus to the trainees is an opportunity during the project to practice in reality what they have been learning in the classroom. For business education projects in a reasonably large school this may be made possible by the assignment of each trainee to work a short time in the school office, under the guidance of the regular staff. In other circumstances, a day or part of a day spent in actually working in an active business office might be arranged for each trainee. Wherever this practical experience, however brief, can be arranged it results in a growth in the confidence of the trainee that the project will prove successful in his or her particular case.

Figure 2

Activity Chart for Salesperson Project

Monday	Tuesday	Wednesday	Thursday	Friday
FIRST WEEK				
Special Schedule. See Today's Bulletin.	Auditorium: Films Topic: Speech	Auditorium: Films Topic: Retail Sales	Mrs. Juncich of Pacific Telephone Co. Topic: Telephone Techniques	National Cash Register. Mr. Roukes will demonstrate the use of the cash register. Students will go to auditorium in small groups at different times throughout the day. No regular auditorium.
SECOND WEEK				
Field Trip 10:10 Sears (Group A) 22:00 Sears (Group B) No Auditorium.	Mrs. Canaris of Power's Modeling School Topic: Grooming	Auditorium: Films Topic: Courtesy Salesmanship	Mrs. Thorlaksson Emporium Topic: Customer Approach	Mrs. O'Dell J.C. Penney Topic: Customer Relations
THIRD WEEK				
Auditorium: Film Strip: "Selling"	Mrs. Clark Macy's Topic: Closing the Sales	Auditorium: National Cash Register Film Strips	Department of Employment. Topic: Applying for a job	To be announced.

B. COUNSELING

1. Individual Differences

An article by Paul Denny in the December, 1963 issue of Business Education World provides an insight into the multitude of problems faced by MDTA trainees which make it especially important that MDTA teachers and counselors work with individuals as well as with groups.

> "This is the MDTA girl . . . the one we know. We know she had enrolled in the MDTA class, that she has some typing background, that she possesses the qualifications for success as a secretary and that she wants to be trained in this program.
>
> "This is the MDTA girl I want to talk about . . . the one we don't know.
>
> "We don't know that she may be here because her husband passed away last year.
>
> "We don't know that things are rough financially around the house right now.
>
> "We don't know that she is barely getting by with her four little children, and no husband.
>
> "We don't know that she didn't eat lunch last Tuesday because there was no money for lunches.
>
> "We don't know that she was afraid to enroll in the course after several years away from study.
>
> "We'll never know how many times she decided to back out--but something kept pushing her on to school.
>
> "We don't know how heavily all the petty problems at home are magnified when she is sitting in class, hour after hour.
>
> "If we knew all these things, we would want to help her more."

2. Group and Individual Counseling

A proper and perhaps vital part of every project is group counseling on topics of common interest and concern. Individual counseling is of equal importance in helping to overcome the individual differences which characterize the usual MDTA project. Students frequently need extra encouragement during the early weeks of the course, when they feel strange, or fearful, or inadequate to the task they have set themselves. Many will need individual help in such areas as:

- Learning or relearning how to study
- Recognizing the importance of regular attendance

- Receiving extra assistance because they are slow learners
- Obtaining satisfactory answers to their personal questions, which they may feel are unique

Where it is available, regular psychotherapy may be and has been called upon to bring a student to success in the course.

In short, individual counseling and guidance by the instructors, by counseling specialists, and by other available persons will be valuable to the trainees and will make a substantial contribution to the achievement of the project goals.

C. SUPERVISION

1. General

In most instances the local supervision of MDTA projects does not require the full time of one supervisor. MDTA supervisors have been interviewed in various training agencies to determine the types of activities performed and the amounts of time devoted to each duty.

2. Survey Results

Figure 3 contains a summary of the supervisory duties performed for MDTA projects in eight different school districts. The duties performed by supervisors are separated into five major categories. Under each is a list of tasks in that category, performed by the supervisor in some or all of the training agencies studied. The numbers in the frequency columns indicate how many supervisors, of the eight training agencies included here, perform a particular task at each frequency.

There does not appear to be a consistent pattern of operations performed by supervisors of the different training agencies, nor of the amounts of time spent in the performance of the different duties. However, it is evident that a wide variety of duties is alloted to supervision in the different training agencies throughout California, and the information in Figure 3 should be helpful to local MDTA supervisors in developing and evaluating their own duties.

Supervision of the classroom instruction should include close working relationships with the Department of Employment. This includes prompt processing of student records, conferences on student problems, and the cooperative development of policies regarding standards of student achievement and retention. The supervisor must be continually conscious of the working relationship which exists in the arrangement with the Department of Employment to furnish students for the class and to take the lead in their final placement in employment. The supervisor has a key role in facilitating this relationship.

3. Sample Job Specification

The following job specification for the position of Supervisor MDTA Stenographer Training was prepared under the direction of the Business Division Dean of a

Figure 3
Survey of Supervisory Functions

Program Development	Frequently	Occasionally	Seldom
1. Develop proposals for MDTA projects	7		1
2. Arrange for guest speakers	2	3	3
3. Select teachers	3	4	1
4. Arrange for classrooms	4	2	2
5. Arrange for equipment	7	1	
6. Attent MDTA Advisory Committee Meetings	2	2	4
Administration			
1. Prepare MDTA forms	6	2	
2. Keep attendance records	3	3	2
3. Keep student achievement records	3	3	2
4. Prepare payroll time cards for teachers	4	1	3
5. Arrange for substitute teachers	2	4	2
6. Write student recommendations	1	2	5
7. Host state and federal MDTA representatives		6	2
8. Follow-up on students who complete projects		1	7
9. Provide information to the press	1	4	3
10. Effect liaison between the school, the Department of Employment, and the Bureau of Business Education	4	3	1
Teaching			
1. Substitute for teachers who are absent		4	4
2. Tutor trainees who experience difficulties	1		7
Supervision			
1. Visit classrooms to seek out weaknesses in instruction and recommend improvements	6	1	1
2. Have students complete evaluations of the MDTA projects	3	2	3
3. Hold conferences with individual teachers	5	2	1
4. Hold group conferences with teachers	3	3	2
5. Inspect school plant for hazardous and substandard conditions	3	3	2
6. Coordinate use of classrooms between MDTA and regular classes, where both use the same facility	3	1	4
Counseling and Guidance			
1. Counsel individual students	4	3	1
2. Give guidance talks to classes	3	5	

junior college. The specifications listed below do not call for a full-time person. The position is assigned to a qualified person already under contract to the college who performs the specified duties as an integral part of his assigned responsibilities.

JOB SPECIFICATION FOR: Supervisor MDTA Stenographer Training

DEFINITION:

Under direction of the Business Division Dean, to assist in the overall supervision of the MDTA Stenographer training class.

TYPICAL TASKS:

1. Provide liaison among teachers, administration, and Department of Employment for effective communications;
2. Maintain inventory records and control of equipment and supplies;
3. Prepare periodic budget reports, process purchase requisitions, assist in administering the budget;
4. Process such reports as are required by the Act;
5. Conduct proper investigations, when necessary, of trainees' attendance and progress and recommend appropriate action;
6. Continue evaluation of the training class and prepare recommendations for improvement of classrooms and instruction;
7. Develop a divisional policy and procedure manual;
8. Attend meetings regarding the program;
9. Assist instructors in making evaluations of student progress and in the final report;
10. Make periodic reports to Business Division Dean regarding class achievement and attendance.

4. Budget Implications

In preparing the cost estimate for an MDTA project proposal, the basis of allocation of the cost of a part-time supervisor must be set forth, with estimates of the time he will spend on each stated function.

D. EVALUATION OF TRAINEES

The certificate of training (Form OE 4146) given each trainee who successfully completes a course of study under an MDTA project indicates the content of the course he has taken and the fact that he has "satisfactorily completed" training. No grades or skill levels are shown.

However, rating of each trainee both as to achievement of the project objectives and as to personal characteristics is required in order to complete the Termination of Training Report (Form MT 102). Each training plan therefore includes expression of the means and methods by which the students' achievements will be measured.

In business education courses involving stenography and typing, evaluation of the quantitative skill toward which the project is aimed presents no problems. Nationally recognized standard tests are readily available and are in general use. The development of skill and the rate of that development are determined at intervals throughout the course and guide the instructor in management of the training.

In other subject areas the experienced instructor may be relied upon to evaluate the achievement of each trainee, in accordance with MDTA program objectives, in terms of the student's arrival at a level of knowledge and the ability to use that knowledge which will meet the requirements for employment.

The evaluation of personal traits, following the outline and form on the reverse of Form MT 102, may be completed either by a designated instructor most familiar with the trainees or, and perhaps preferably, by collaboration between the instructor, counselors, and supervisors who have been engaged in the project throughout its life.

Part VI

REQUIRED REPORTS

In order to provide for the orderly administration of MDTA projects, including their funding, reports are required. Most of the reports required on business education projects are either originated or contributed to by the training agency. They are reviewed by, or further action is taken by, the Regional Supervisor, the Chief of the Bureau of Business Education, and the State Director of Vocational Education. By means of the reports, requisite information is provided to the State Department of Employment, other state agencies concerned, and the federal agencies that are involved in the administration of MDTA projects.

Only a brief list of the required reports is given here, for handy reference. Sample report forms, with directions for their use, are contained in the MDTA Manual. Copies of the forms, for study or for use, are normally obtained through the office of the Regional Supervisor of Business Education, or from the local office of the Department of Employment.

The report list which follows is in the approximate order of use, starting with implementation of the project. "Requests for Reimbursement," which include a report of project expenditures, were covered under "Funding."

1. Subject: Trainee Referral

   Time: At initiation of project, and at termination of each trainee

   Forms: Form 950-B, when trainee is entitled to training allowances; Form 959, when trainee is not so entitled

   Originator: Department of Employment

   Content and Training Agency action: Each trainee presents a copy of the appropriate form at the start of the project. Training agency endorses one part, indicating trainee either has started or will not be admitted to the training. At termination, upon completion, or for other reasons, a second part of the report is completed by the training agency.

2. Subject: Weekly Request for Allowances

   Time: At end of each project week

   Form: ES 952

   Originator: Each trainee entitled to allowances

   Content and Training Agency action: Trainee requests payment of his allowances, reporting completion of the week's training. Training agency endorses, reporting satisfactory attendance and progress, and forwards to Department of Employment for action.

3. Subject: Project Implementation

Time: At end of first week of operation (one time)

Form: OE 4021

Originator: Training agency

Content and Action: Training agency reports start of project, approved budget, and number of trainees starting the project. Forwards via Regional Supervisor to Department of Education for further disposition.

4. Subject: Report of Individual Termination

Time: When occurring; forwarded monthly (see 5 below)

Form: MT 102

Originator: Training agency

Content and Action: Reports each individual termination, with reasons and other information, via Regional Supervisor, to State Director of Vocational Education for distribution.

5. Subject: Report of Terminations

Time: Monthly during project, and upon project completion

Form: MT 104

Originator: Training agency

Content and Action: Summarizes the student terminations for each month, and acts as transmittal document for Reports of Individual Termination.

6. Subject: Certificate of Training

Time: At end of training period

Form: OE 4146

Originator: Training agency

Content and Action: Given each student upon successful completion of his training, as an aid to employment. Summarizes the course as to subjects and hours. Grades are not included. Use of this certificate is not intended to discourage additional presentation by the training agency of more formal certificates or diplomas.

7. Subject: Equipment Inventory

Time: Upon completion of major equipment purchases from project funds

Form: VEMDT-3

Originator: Training agency

Content and Action: Lists equipment acquired with project funds that has unit value over $50. Submitted via Regional Supervisor to State Director of Vocational Education.

8. Subject: Transfer of Equipment

Time: When occurring

Form: VEMDT-3a

Originator: Director of Vocational Education

Content and Action: When agreement has been reached upon a transfer of MDTA equipment between districts. Form VEMDT-3a is prepared by the Director of Vocational Education, and serves as authorization, report, and record of the transfer.

Part VII

PROJECT EVALUATION

Evaluation is a cumulative process; the knowledge gained from thoughtful evaluation of a single project may prove of much benefit; the composite from a number of like projects will be of even more use to all similar ones that follow; and each overall evaluation of the entire gamut of projects can provide the basis for progressive improvement in the entire program, and for its continuance or termination.

A. FOLLOW-UP

No business education project under MDTA should be deemed satisfactorily completed until follow-up has been made to obtain as much information as practicable about its lasting results. The resulting feedback forms a most significant portion of the basis for project evaluation, and by projection for the evaluation of the overall program.

1. Purposes

a. To accumulate bare statistics as a quasi-measure of the dollar value received from the expenditures made. The numbers of trainees selected, admitted, dropping out, completing, hired as a result of training, and retaining their employment are samples of such statistics susceptible to analysis.

b. To serve as a basis for effecting continuous improvement in successive courses. Student and employer comment would be useful additional items for this purpose.

c. To provide a needed yardstick for measuring the allowable gap between entry ability and completion goals, within the 72-week constraint placed upon project length. Feedback with regard to securing and holding jobs, considered with the data from the required project reports, may be of significance here.

2. Sources

a. Project reports. (Outlined in Part VI.) These provide statistics covering the period from start to completion of instruction, together with reasons for termination, and other information.

b. Department of Employment reports. The State Department of Employment makes three follow-ups on each MDTA project with both trainees and their employers. Both their raw data and their analyses of it should be of interest to all those responsible for training, when studied on a previously planned basis.

c. Training agency studies. Training agencies have made studies and follow-up surveys varying in scope, depth, and purpose. In initiating such activity, schools should not wittingly duplicate the activity of the Department of Employment, nor place burdensome requests upon trainees or employers for unlimited amounts of information and data. Excerpts from such a follow-up study, given below, indicate some of the possibilities.

d. Unsolicited feedback. Most agencies, instructors, and counselors receive a certain amount of post-training comment from trainees or others who have been connected with the course. Such comment is worthy of correlation and consideration with other information obtained.

Excerpts from a Follow-up Study of an MDTA Stenography Project at a Junior College

Purpose: The purpose of this study is twofold: first--to obtain information regarding the status of former students, and second--to measure the effectiveness of the training in our first MDT program, with the intent of taking corrective action where advisable and to use the suggestions in further development of the program.

Background: Cal-60 MDTA was initiated February 18, 1963, with 29 students. It was a non-graded class in Stenographer Training designed to provide proficiency in the stenographic skills and to produce competent stenographers in a course of 30 weeks of training. Students attended classes six hours per day from nine o'clock in the morning until four in the afternoon. Minimum requirements included some typing and knowledge of the keyboard. Some of the applicants received subsistence while others not eligible for subsistence allowance attended under the youth provision of the Act.

Two fully credentialed instructors were employed on an hourly basis. One taught shorthand in the mornings and one taught typing, business math, business English, and office procedures in the afternoon. A supervisor was appointed on the basis of seven hours per week.

Although the class was started with 29 students, a series of illnesses, accidents, and transfers from the district brought the final figure to 19.

Since this was a first program, emphasis was placed on evaluation throughout. At the end of the session students were interviewed individually for information which could be utilized immediately in preparing a new application. They were also advised of the intention to contact them in a formal follow-up to be conducted within the year to establish how the training filled the needs of the individual once she was employed.

Figure 4
Form Sent for Follow-Up Study

Date ______________

1. Name ________________________________ Male ____ Female ____

2. Address ________________________________ Tel. ______________

3. Are you a graduate of Fresno City College? Yes _____ No _____ Year 19____

4. If not a graduate, how long did you attend? ______________ Semesters __________

5. Are you married? Yes _____ No _____ Maiden Name ____________________

6. At the present time I am: (Please check)

   a. Working full time ______ c. Going to school ______ e. Housekeeping ________

   b. Working part time ______ d. Out of work ______ f. Military service ________

   g. ____

7. If you are working, please complete the following for your present position:

   a. Firm or Employer . . ________________________________

   b. Employer's address . ________________________________

   c. Type of business . . . ________________________________

   d. Your position & duties ________________________________

   e. Starting date __________ Beginning salary $__________ Present salary $__________
   (Please indicate total salary and whether weekly or monthly.)

   f. Does the company pay a bonus? Yes ___ No ___ Fringe benefits? Yes ___ No ___

   g. Is your present work in line with your training? Yes ___ No ___ Partly ____

8. Please list the positions you have held since leaving Fresno City College exclusive of your present employment noted above.

Dates of Employment Month & Year	Name & Address of Firm or Employer	Type of Work Done Reasons for Leaving	Salary or Wages
1. From __________	________________	________________	Start __________
To __________	________________	________________	End __________
2. From __________	________________	________________	Start __________
To __________	________________	________________	End __________

Use Reverse Side if Necessary

9. In your work what difficulties have you met which might have been covered in your school training? (Please check)

a. Alphabetizing & Filing ___
b. Arithmetic Fundamentals ___
c. Cutting Stencils ___
d. English Fundamentals ___
e. Inability to Use Add. Mach. ___
f. Lack of Accounting Knowledge ___
g. Lack of Speed on Comptometer ___
h. Lack of Speed in Shorthand ___
i. Lack of Speed in Typing ___
j. PBX - Switchboard Work ___
k. Penmanship ___
l. Spelling ___
m. Tabulation ___
n. Typing Figures ___
o. Use of Bank Posting Machine ___
p. Use of Mimeograph Machine ___
q. Use of Rotary Calculator ___
r. Use of Telephone ___
s. Use of Duplicating Machines ___
t. Use of Bookkeeping Machines ___
u. Personality Development ___
v. ____________ ___

Other Difficulties: ____________

10. Please check the different types of office machines which you have used on the job.

a. Spirit Duplicator ___
b. Mimeograph ___
c. Mimeoscope ___
d. Vari-Typer ___
e. Multilith ___
f. Addressograph ___
g. Ediphone ___
h. Dictaphone ___
i. Audograph ___
j. Teletype ___
k. Soundscriber ___
l. Rex Recorder ___
m. Adding Mach Full Keybd ___
n. Adding Mach 10-key ___
o. Billing Machine ___
p. Bank Posting Machine ___
q. Burroughs Bkkpg Mach ___
r. National Bkkpg Mach ___
s. Remington Bkkpg Mach ___
t. Underwood Bkkpg Mach ___
u. National Bkkpg Mach ___
v. Marchant Calculator ___
w. Monroe Calc ___
x. Friden Calc ___
y. Burroughs Calc ___
z. Comptometer ___
aa. Cash Register ___
bb. Check Writer ___
cc. Key Punch ___
dd. Collator ___
ee. Stenorette ___
ff. ________ ___
gg. ________ ___

11. If you use a typewriter on your present job, please check below the make and whether it is manual or electric.

Make	Manual	Electric
Remington		
Royal		
L.C. Smith		

Make	Manual	Electric
Underwood		
IBM		
Other		

12. How did you secure your first job after leaving school? Please check:

School Placement ___ Employment Agency ___ Calif. State Employment ___
Friend or Relative ___ Other ____________

13. What changes would you recommend in your business training program?

____
____
____

14. Comments: (Use back of sheet.)

The Survey: A questionnaire with a cover letter was mailed to all 29 of the original students on December 20. The existing questionnaire used in the Business Division's five-year follow-up was used since it has been tested and proved satisfactory. Response was good. Eighteen of a total of twenty-nine questionnaires mailed out were returned. The results have been tabulated and percentages drawn.

Findings, recommendations, and action. The following findings and recommendations were made and the action shown was taken in the new project as a result of the follow-up.

1. The curriculum is in need of a change of emphasis both from viewpoint of total hours and the division of time within the proposed subject areas.

   ACTION: The thirty-weeks course was increased to thirty-four weeks . . . It was determined that the most often mentioned deficiencies dictated additional instruction in English, mathematics, spelling, and office procedures.

2. Special emphasis must be placed on training in the use of equipment which the stenographer uses on the job.

   ACTION: Students were shifted for their training to the Business Division's machine calculation laboratory, the office training laboratory, and the PBX and shorthand laboratory. There is now hands-on training for all students simultaneously rather than piecemeal "exposure" resulting from inadequate equipment. This required an increase of approximately eighty hours in training time.

3. Consideration must be given to the differences which exist among individuals in the MDTA program because of their educational backgrounds, family situations, transportation problems, etc.

   ACTION: The following actions were taken in the succeeding project to alleviate and avoid situations which arose by reason of the fact that the individuals were different.
   (a) School holidays were observed. This prevented problems of babysitting and transportation which were directly related to school schedules.
   (b) The program was offered concurrently with the regular school year, extending only one week beyond the college's regular semester. Somewhat as in (a) above, this eliminated the objection which arose because the earlier program had been operated throughout the summer when elementary schools were not in session.
   (c) Students in the program showed a propensity toward expression of emotional problems. Some students were undergoing psychiatric treatment during the time they were in the program. Frequent reference to the use of tranquilizers,

sometimes not under a doctor's prescription, provided the springboard for a thorough examination of the emotional climate of the program. This resulted in scheduling definite coffee breaks, with coffee, and the introduction of background music when the situation would allow. Since the pressure arising from intensive shorthand drill seemed to be contributory, the shorthand was broken up in the new project. English, spelling, and business correspondence were integrated into the three-hour morning period thus providing variety of experience during that time. Emphasis was placed on human relations aspects and handling emotional problems on the job. Extensive personal and individual counseling was provided by the two instructors, the college nurse, the supervisor, and the dean of the Business Division.

4. The selective process must be exercised more carefully, in order to narrow the range of abilities of entering students.

   ACTION: While in the first session students who had very limited ability in typing were admitted, no such case existed in the second. A very definite effort was made to avoid placing people already having good shorthand skills in the class, thereby eliminating the necessity for ability grouping in shorthand.

5. Some form of work experience should be provided to allow for easy transition from classroom to the job.

   ACTION: This recommendation posed a very serious problem which was approached but certainly not solved. Several courses of action in the second class contributed something of value.
   (a) Field trips to local offices were increased.
   (b) The supervisor gave office type dictation on occasion to the whole group.
   (c) The shorthand laboratory was used extensively.
   (d) A limited number of students (6) reported to the division dean and worked for one-half day taking regular dictation and transcribing the letters.

B. EVALUATION OF THE PROJECT

1. Study and Analysis of Reports

Project reports and feedback information must be collated and analyzed on a planned and regular basis if they are to be of any assistance to the improvement of the MDTA program as a whole. The extent to which improvements effected by a single training agency--in themselves very worthwhile--can contribute to the overall program betterment sought will depend upon the communication of the knowledge gained and the analysis made of it from one level to the next, and upon the quality of the resultant treatment systematically given there. The transmission of feedback analyses to the Regional Supervisor by each agency is definitely encouraged. The ability of the regional office to collate and analyze the total information received, and to pass it on to the Bureau, and so on, will eventually result in a program which continues to more nearly attain its goals, with growing efficiency and improving economy.

2. Committee Functions in Evaluation

The roles of the local, state, and national committees in the evaluation of past projects should not be neglected, especially in view of their influence upon the course of future projects. When provided with the needed information, the committees at each level can assist in its meaningful analysis by providing corollary information and opinions, such as influences and impacts upon the local or national economy, which will add appreciably to the value of the analyses. Requests to the committees to assist in evaluation will generally be both welcome and productive. Moreover, the assigned functions of the various committees established have built into them an influence upon the future of the program which should be fostered, not ignored.

3. Internal Evaluation

Finally, internal evaluation of each succeeding project in the light of all that is learned about it is recommended. Perhaps this action should be listed both first and last in the evaluation process. Again, such examinations should be planned and participated in by all those who took part--the supervisor, the instructors, and the counselors. Any weaknesses revealed should give rise to the earliest possible correction. One check sheet that has been developed for this purpose is shown on page 71. (Form MDBE No. 4.)

California State Dept. of Education
Bureau of Business Education
Form MDBE No. 4

Date ______________

SELF EVALUATION CHECK SHEET
MDTA OFFICE OCCUPATIONS TRAINING PROGRAM

at ______________________________

for ______________________________
(Job Classification)

Program Objectives

Yes	No	Changes Planned	
			1. The aims and objectives of the program are clearly stated and understood by supervisors, instructors, and students.
			2. Courses being taught are adequate to meet the over-all objectives of the program.
			3. At the beginning of the program, each student is made aware of the objectives of each course and the standards of achievement expected to satisfactorily complete that course.
			4. An advisory committee is appointed for the purpose of making recommendations regarding objectives and standards of performance.

Evaluation

			5. The entire program is evaluated at the end of each training period by teachers, supervisors, and students in terms of stated objectives.
			6. Records are kept which show the progress of individual students.
			7. Records are kept concerning student drop-outs.
			8. Midpoint in the program, an evaluation is made in which supervisors, instructors and students participate to determine if the instructional program is meeting needs and objectives.

Physical Facilities and Equipment

			9. The rooms used are adjacent or near to each other.
			10. If artificial lights are used, they provide at least 50 foot candle power on copy.
			11. The rooms are so located or soundproofed that the noise of the machines does not interfere with instruction in other classes.

Physical Facilities and Equipment (Cont'd.)

______ ______ ______ 12. Storage facilities in the room are adequate and readily available. (This includes facilities for personal belongings of students.)

______ ______ ______ 13. Audio-visual equipment is adequate and readily available.

______ ______ ______ 14. The rooms used for teaching record keeping and shorthand have a minimum of twenty-four feet of chalkboard.

______ ______ ______ 15. The rooms used for teaching office practice and typewriting have a minimum of eight running feet of chalkboard.

______ ______ ______ 16. Typewriters are less than five years old and are being properly maintained.

______ ______ ______ 17. Other business machines (than typewriters) are less than ten years old and are well maintained.

______ ______ ______ 18. Business machines are adequate to meet the objectives of the program.

______ ______ ______ 19. A comprehensive record is being kept of all equipment concerning a description of the item, the date of purchase, the cost, from whom purchased, and the serial number.

______ ______ ______ 20. A comprehensive record is being kept of machine repair service.

______ ______ ______ 21. Restroom facilities are adequate and are well maintained.

______ ______ ______ 22. The rooms used represent a pleasant atmosphere in which to study and work.

______ ______ ______ 23. Chairs and desks used by students are in good condition and are satisfactory for their purpose.

______ ______ ______ 24. Tables providing a work area of a minimum of 24" x 36" are being used in shorthand and record keeping classes.

______ ______ ______ 25. Ventilation of the rooms is adequate.

______ ______ ______ 26. Heating of the rooms is adequate.

______ ______ ______ 27. There are sufficient electrical outlets in rooms.

______ ______ ______ 28. The space provided in the classrooms is sufficient so that there is no crowding of furniture and equipment and there is ease of mobility.

Physical Facilities and Equipment (Cont'd.)

______ ______ ______ 29. The layout of classrooms provides for effective use of facilities.

Instructional Staff

______ ______ ______ 30. The instructors have a mastery of the subject matter in the area in which they are teaching.

______ ______ ______ 31. The instructors hold or are eligible to hold an appropriate credential.

______ ______ ______ 32. Instructors keep up to date in instructional methods through reading current professional magazines, taking additional course work occasionally, etc.

______ ______ ______ 33. Within the instructional load, there is sufficient time allotted to planning of the instructional program.

______ ______ ______ 34. The appearance of the teachers is such that they set a good example for their students.

______ ______ ______ 35. The instructors have a relationship with their students which is conducive to learning.

______ ______ ______ 36. The instructors have a well-developed course outline for each subject.

______ ______ ______ 37. The instructors have the respect and cooperation of their students.

______ ______ ______ 38. Instructors review courses of study for possible revision before the beginning of each new training group.

______ ______ ______ 39. The instructors and their supervisors work closely and cooperatively to provide a well-developed program.

______ ______ ______ 40. The instructors indicate that they respect the dignity of their students as individuals in their own right.

Curriculum and Instruction

Typewriting

______ ______ ______ 41. Each student receives at least ten hours of instruction on an electric typewriter.

______ ______ ______ 42. The practice of proofreading accurately is developed.

______ ______ ______ 43. Particularly in the second half of the course, students work on practical problems which may be in the form of a practice set.

______ ______ ______ 44. Students learn to change typewriter ribbons early in the course.

______ ______ ______ 45. There are several dictionaries or books giving spelling and syllabication of words available in the typewriting room.

______ ______ ______ 46. Typewriters with open keyboards, rather than covered keys, are used.

______ ______ ______ 47. There is at least one utility typewriter in the typewriting room for use in case of a breakdown of the machines that are used regularly.

______ ______ ______ 48. Typewriter desks or tables are adjustable or vary in height between 27 and 30 inches.

______ ______ ______ 49. Chairs, 16 to 18 inches in height, are provided in the typewriting room.

______ ______ ______ 50. The typewriting room has a typewriting demonstration stand.

______ ______ ______ 51. Effective use is made of the demonstration stand.

______ ______ ______ 52. The typewriting room has an interval timer and a stop watch as part of its equipment.

______ ______ ______ 53. Production tests, as well as straight copy tests are included in the instructional program.

Shorthand

______ ______ ______ 54 Copies of secretarial handbooks are available, and students are briefed on the utilization of these books.

______ ______ ______ 55. The chalkboard or an overhead projector is used frequently by the teacher for demonstration and drill.

______ ______ ______ 56. Additional dictation practice is available to students through the use of tape recorders or other listening devices.

______ ______ ______ 57. Students have access to typewriters during the same period that shorthand instruction is given or during the following period--at least during the last half of the instructional program.

Adding and Calculating Machines

______ ______ ______ 58. Students are given practical problems on the various machines in order that they learn the application of the machine to an actual work situation.

______ ______ ______ 59. Students attain a degree of proficiency on business machines which meets employment requirements.

Filing

______ ______ ______ 60. Miniature filing practice sets are provided for use in the instructional program.

______ ______ ______ 61. Course emphasis is on the rules for indexing and filing and on alphabetic filing systems. Some time may be spent on numeric, geographic and subject filing and possibly one or two patented systems such as Variadex and Soundex.

Office Practice

______ ______ ______ 62. Instruction in telephone courtesy and in receiving callers is included in the course.

______ ______ ______ 63. Students are briefed and receive practical instruction relative to the application and interview for employment.

______ ______ ______ 64. The use of office reference books is included as part of the instruction of the course.

______ ______ ______ 65. Job instruction sheets (sheets providing a step-by-step description of the operation of a machine) are available for students to follow when the teacher is not available for help.

______ ______ ______ 66. Instruction on duplicating processes and machines and development of proficiency in the use of transcribing machines is included in the course (if not elsewhere in the curriculum).

______ ______ ______ 67. The subject matter of the course includes some emphasis on speech and conversation, dress and grooming, manners and human relations.

Business Mathematics

______ ______ ______ 68. Pretesting is done to determine at what point to start teaching so that time is not spent on things the students already know.

______ ______ ______ 69. The fundamental processes, fractions, decimals, percentages, and their business application, together with some record keeping, make up the basic subject matter of the course.

Business English

______ ______ ______ 70. In addition to providing a rapid review of grammar, sentence structure, spelling punctuation, and use of the dictionary, the course places emphasis on vocabulary. building and the principles of business letter writing.

______ ______ ______ 71. There are sufficient reference books available so that all students learn to use them.

General

______ ______ ______ 72. Well-developed course outlines are up to date, readily available, and used.

______ ______ ______ 73. The textbooks being used are adequate to meet the course objectives.

______ ______ ______ 74. Provision is made for the differing abilities of students.

______ ______ ______ 75. Instruction in the program is geared to the adult level.

______ ______ ______ 76. Day-to-day work in the courses reflect careful planning on the part of the instructors.

______ ______ ______ 77. There is a sufficient number of instructors teaching the program so that students are receiving a well-rounded instructional program.

______ ______ ______ 78. Good work habits are developed through example by such things as starting class on time, using class time to good advantage, etc.

______ ______ ______ 79. Students are periodically informed of their progress in each of the subject matter areas.

Appendix

OCCUPATIONS LIST

Business education training projects in the following occupations have been carried out under MDTA. Some have been given by a single agency, others by as many as 10 to 12 different agencies throughout California. Both public and private institutions have participated. Further information concerning any of them can be obtained from the Bureau of Business Education or its Regional Representatives in Los Angeles, Oakland, and Sacramento.

Calculating Machine Operator
Clerk, General Office
Clerk, Hospital Receiving
Clerk, (refresher)
Clerk-Stenographer
Clerk-Typist
Duplicating Machine Operator
Grocery Checker
Salesman
Salesperson, General
Secretary
Secretary, Clerical
Secretary, Legal
Secretary, Medical
Stenographer
Stenographer, Technical
Teller, Banking
Transcribing Machine Operator
Typist-Clerk
Typist, Reproduction

Selected References

1. Publications of the California State Department of Education, Sacramento, California.

   MDTA Manual, 1962. (Periodically revised.)

   Progress Report and Programs developed under MDTA, 1964.

   Office Procedures: A Teacher's Manual, 1965.

   Training Plans and Training Programs developed under MDTA, 1964.

2. Other Publications.

   The Manpower Development and Training Act Handbook. Sacramento: California State Department of Employment, 1962. (Periodically revised.)

   Two Years of Progress under MDTA. Los Angeles: Division of College and Adult Education, Los Angeles City School Districts, 1964.